REQUISE	Fron For Supi	PLI <mark>ES/SE</mark>	RW66-23	Filed 06/24/5	PR 07, 2	age 496 3640 	
1.REQUISITION NO.	2. PRIORITY	3.AMOL	JNT	4. DELIVERY DAT	E	5. FUNDS AVAILABLE	
EDOIES-22-000203		139,21	3.00	SEP 30, 2022		x Funds Available	SAF
6. CONTACT (Name and Phone) Gloria Vera 202-245-8245			IORIZED BY ne Minor			8. CONTRACT/IDC NO 91990022C0014).
9. PURCHASE FOR		OERIXO	10. DEPT	11. FUND 12. P	ROJECT		13. FSC
Leontyne Minor, Executive Officer Dept. of ED/IES		OLIVIA	IES	1100			
550 12th Street SW, Room 4030			14. ACCOUNTIN	IG AND APPROPRIA	ATION DA	λΤΑ	
Washington DC 20202			See Schedule				
			16a. RECOMME	NDED COR			
15a. DELIVER TO			Janelle Sands				
		OERIXO	16b. FUND CER	TIFYING OFFICIAL			
Leontyne Minor, Executive Officer Dept. of ED/IES			Gloria Vera				
550 12th Street SW, Room 4030			17. VENDOR				
Washington DC 20202							
15b. SUPPLEMENTAL ADDRESS							
TOD. OUT LEMENT ALTERNATION							
18 PURPOSE							

REL Southeast

ITEM OR FORM NO. (19)	DESCRIPTION (20)	QUANTITY (21)	UNIT (22)	UNIT PRICE (23)	AMOUNT (24)	
	Please See Continuation Page for Line Item Details					
					D 003171	

	Case 8:25-cv-01154-BAH СВОНЕОБИТЕ	Mg nu ed iled	06/24/	/25 Page 2 of 3	64
ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
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	Accounting and Appropriation Data: 1100M2022.B.2022.ER000000.RL2.2550A.000.117. 0000.000000				
				ED 0	03172

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2 weeks before meeting	2 weeks after meeting	2 weeks before meeting	2 weeks after meeting	2 weeks before meeting	2 weeks after meeting	2 weeks before meeting	2 weeks after meeting	11/30/22		4/25/22	3/30/23	1/31/24	+7/27/5		4/29/2022 4/15/2022	4/29/2022	4/29/2022	11/30/2022	6/30/2022	4/29/2022	11/30/2022	As needed; 2 weeks before meeting	As needed; 2 weeks before meeting	As needed; 2 weeks before	As needed; 2 weeks before meeting		4/28/2022	7/28/2022	7/28/2022	10/27/2022	1/26/2023	1/26/2023	4/27/2023	7/27/2023	7/27/2023		
oss-REL working group agenda - Year 1 Quarter 3	oss-REL working group memo - Year I Quarter 3		Cross-REL working group memo - Year 1 Quarter 4 n		oss-REL working group memo - Year 2 Quarter 1	r2	Cross-REL working group memo - Year 2 Quarter 2	Early-Cycle Review Proposal Farly Cycle Review Product	Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments	Signed letter(s) of intent with each regional CC in REL Region	Annual memo of needs serising between KEL and CCs Joint needs sensing summary meeting minutes	Annual memo of needs sensing between REL and CCs	artnership with Stakeholders	Conduct needs-sensing and develop partnerships	Partnership Proposal—South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)	Partnership Proposal–Mississippi Adolescent Literacy (MSAL)	Learner Outcomes (AL ELO)	Partnership Proposal—Florida K-3 Literacy (FLK3) Partnership Proposal—Florida Virtual School Partnership (FLVS)	Partnership Proposal School Climate and Literacy (SCAL4GA)	Partnership ProposalNorth Carolina Competency-Based Education Partnership (NCCBE)	Partnership Proposal-Diversifying the Educator Pipeline at Historically Black Colleges and Universities (HBCUs)	Needs sensing meeting materials (Partnership TBD)		Needs sensing meeting materials (Partnership TBD)	Needs sensing meeting materials (Partnership TBD)	Maintain partnerships under subtask 3.1	Partnership meeting materials and agendas for Year I Quarter I	Partnership meeting summary memos for rear 1 Quarter 1 Partnership meeting materials and agendas for Year 1 Quarter 2	Partnership meeting summary memos for Year 1 Quarter 2	Partnership meeting materials and agendas for Year I Quarter 3	Partnership meeting summary memos for x ear 1 Quarter 3 Partnership meeting materials and agendas for Y ear 1 Quarter 4	Partnership meeting summary memos for Year 1 Quarter 4	Partnership meeting materials and agendas for Year 2 Quarter 1	Partnership meeting materials and agendas for Year 2 Quarter 2	Partnership meeting summary memos for Year 2 Quarter 2 Summary of Stakeholder Feedback Survey results for partnerships Year 1	aching, and Techinical Support (TCTS)	ICLS Projects South Carolina Emergent Literacy Professional Learning Community South Carolina Emergent Literacy Professional Learning Community
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Security Risk Levels Declaration Form (Pre-Award)

This form is to be completed by the program office and submitted as part of the Procurement Package for any procurement involving security risk levels. The most typical reasons for including security risk levels in a contract are when the contractor will have access to Department facilities, Department IT systems, personally identifiable information (PII), sensitive information, or minors (persons under 18 years old). It is the program office's responsibility to identify the appropriate security risk levels (*i.e.*, low, moderate, or high). The program office is encouraged to review Administrative Communications System (ACS) Departmental Directive OM: 5-101 ("Contractor Employee Personnel Security Screenings"), which provides guidance on this issue. The security risk levels identified on this form will be included in EDAR 3452.239-72 Department Security Requirements (MAY 2011/DEVIATION DEC 2019), a contract clause that Contracts and Acquisitions Management (CAM) will include in your solicitation and contract (see Appendix 1 and 2).

Title of Procurement	REGIONAL EDUCATIONAL LABORATORY FY21/FY22 ACQUISITION
Procurement Tracking Number, if applicable	91990020R0032

For each access level or job position necessitating a security risk level, please fill out the boxes below. For each position, identify a risk level (low, medium or high). Samples of position/descriptions could include "Personnel with System Administrator level access to XYZ system," or "Personnel with Supervised access to minors."

·		,
Personnel Position or Job Description	Corporate Security Liaison: Assigns contract personnel as applic	
Risk Level	Moderate	
	•	
Personnel Position or Job Description	Director: Leads the managerial team in planning, conducting, mo	
Risk Level	Moderate	
Personnel Position or Job Description	Deputy Directo	r: Oversees the day-to-day operations of the REL
Risk Level	Moderate	
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Personnel Position or Job Description	Principal Investigator I: Leads the project team in planning and	
Risk Level	Moderate	
Amy Johnson	า	JOHNSON Digitally signed by AMY JOHNSON Date: 2022.03.15 13:34:59 -06'00'
Contracting Officer's Rep	presentative	Signature
Leontyne Buffaloe Minor		LEONTYNE MINOR Date: 2022.03.17 12:10:25 -04'00'
Executive Officer		Signature
If the contract includes a	ny Information Tech	nology (IT):
Computer Security Offic	er	Signature

EDAR 3452.239-72 Department Security Requirements (May 2011)

- (a) The contractor and its subcontractors shall comply with Department security policy requirements as set forth in the "Bidder's Security Package: Security Requirements for Contractors Doing Business with the Department of Education" athttp://www.ed.gov/fund/contract/about/bsp.html.
- (b) The following are the contractor employee positions required under this contract and their designated risk levels:

Personnel Position Job Description	Risk Level
[To be filled in by CAM]	High Risk
[To be filled in by CAM]	Moderate Risk
[To be filled in by CAM]	Low Risk

- (c) All contractor employees must undergo personnel security screening if they will be employed for 30 days or more, in accordance with Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings." The type of screening and the timing of the screening will depend upon the nature of the contractor position, the type of data to be accessed, and the type of information technology (IT) system access required. Personnel security screenings will be commensurate with the risk and magnitude of harm the individual could cause.
- (d) The contractor shall -
 - 1) Ensure that all non-U.S. citizen contractor employees are lawful permanent residents of the United States or have appropriate work authorization documents as required by the Department of Homeland Security, Bureau of Immigration and Appeals, to work in the United States.
 - 2) Ensure that no employees are assigned to high risk designated positions prior to a completed preliminary screening.
 - 3) Submit all required personnel security forms to the contracting officer's representative (COR) within 24 hours of an assignment to a Department contract and ensure that the forms are complete.
 - 4) Ensure that no contractor employee is placed in a higher risk position than that for which he or she was previously approved, without the approval of the contracting officer or the COR, the Department personnel security officer, and the Department computer security officer.
 - 5) Ensure that all contractor employees occupying high-risk designated positions submit forms for reinvestigation every five years for the duration of the contract or if there is a break in service to a Department contract of 365 days or more.
 - 6) Report to the COR all instances of individuals seeking to obtain unauthorized access to any departmental IT system, or sensitive but unclassified and/or Privacy Act protected information.
 - 7) Report to the COR any information that raises an issue as to whether a contractor employee's eligibility for continued employment or access to Department IT systems, or sensitive but unclassified and/or Privacy Act protected information, promotes the efficiency of the service or violates the public trust.
 - 8) Withdraw from consideration under the contract any employee receiving an unfavorable adjudication determination.
 - 9) Officially notify each contractor employee if he or she will no longer work on a Department contract.
 - 10) Abide by the requirements in Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings."
- (e) Further information including definitions of terms used in this clause and a list of required investigative forms for each risk designation are contained in Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings" available at the Web site listed in the first paragraph of this clause.
- (f) Failure to comply with the contractor personnel security requirements may result in a termination of the contract for default.

EDAR 3452.239-72 Department Security Requirements (DEC 2019)

Prescription/or use (applies to, both, 3452.239-71 and 3452.239-72):

3439.702 Department security requirements (DEVIATION).

The contracting officer must include the solicitation provision in 3452.239-71 (DEVIATION) (Notice to offerors of Department security requirements) and the clause at 3452.239-72 (DEVIATION) (Department security requirements) when contractor employees will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (11) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present.

Deviated provision 3452.239-71:

3452.239-71 Notice to offerors of Department security requirements (DEVIATION)

As prescribed in 3439.702, include the following provision in solicitations when the offeror's employees would have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (IT) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present:

Notice to offerors of Department security requirements (DEVIATION)

- (a) The successful contractor must comply with Department of Education personnel, cyber, and privacy security policy requirements as set forth in "Security Requirements for Contractors Doing Business with the Department of Education" at http://www.ed.gov/fund/contract/about/bsp.html.
- (b) Contractor employees who will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, or ED IT systems, systems maintained on behalf of ED, ED facilities or space, and/or perform duties in a school or in a location where children are present, must undergo a personnel security screening and a favorable determination and are subject to reinvestigation as described in the "Contractor Vetting Security Requirements." Compliance with these "Contractor Vetting Security Requirements," is required.
- (c) The type of security investigation required to commence work on an ED contract is dictated by the position designation determination assigned by ED. All ED contractor positions are designated commensurate with their position risk/sensitivity, in accordance with Title S Code of Federal Regulations (5 CFR 731.106) and OPM's Position Designation Tool (PDT) located at: https://pdt.nbis.mil/. The position designation determines the risk level and the corresponding level of background investigations required.
- (d) The contractor shall comply with all contractor position designations established by ED.

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Attachment A - Prescription

(e) The following are the contractor employee positions r designated risk levels:	equired under this contract and their
Moderate Risk (MR): (Specify MR position	ns or Insert "Not Applicable") ns or Insert " Not Applicable") or Insert " Not Applicable")
(t) For performance-based contracts where ED has not ic positions, ED considers the risk sensitivity of the services and systems that will be required during performance, to level designation for all contractor employees who will be uniform contractor position risk level designation application.	to be performed and the access to ED facilities determine the uniform contractor position risk e providing services under the contract. The
(Contracting Officer to complete with overall rise	k level: or insert "Not Applicable")
(g) Only U.S. citizens will be eligible for employment on c Risk/Public Trust, High Risk/Public Trust, or a National S	
(h) Permanent resident aliens may be eligible for employ Trust access.	ment on contracts requiring Low Risk/ Public
(i) An approved waiver, in accordance with "Contractor for any exception to the requirements of paragraph (g)	• • • • • • • • • • • • • • • • • • • •
(j) Performance of this contract will ☐ will not ☐ involve maintained on behalf of ED. For contracts that require a maintained on behalf of ED, the Information Security Cat objective has been determined to be:	access to ED IT systems and/or systems
Confidentiality: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Integrity: Low Moderate High	(Contracting Officer to complete)
Availability: ☐Low ☐Moderate ☐ High	(Contracting Officer to complete)
Overall Risk Level: \[\]Low \[\] Moderate \[\] High	(Contracting Officer to complete)
(k) Performance of this contract ☐ does involve ☐ does not be PTI Confidentiality Impact Level has been determine	•
□Not Applicable □Low □Moderate □High.	
(End of Provision)	

Attachment B - Deviated Clause

Deviated clause 3452.239-72:

3452.239-72 Department security requirements. (DEVIATION)

As prescribed in 3439.702, include the following clause in contracts when the contractor's employees will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (IT) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present:

Department Security Requirements (DEVIATION)

- (a) The contractor and its subcontractors shall comply with Department of Education personnel, cyber, and privacy, security policy requirements as set forth in "Security Requirements for Contractors Doing Business with the Department of Education" at http://www.ed.gov/fund/contract/about/bsp.html.
- (b) Contractor employees who will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, or ED IT systems, systems maintained on behalf of ED, ED facilities or space, and/or perform duties in a school or in a location where children are present, must undergo a personnel security screening and a favorable determination and are subject to reinvestigation as described in the "Contractor Vetting Security Requirements." Compliance with these "Contractor Vetting Security Requirements," as amended, is required.
- (c) The type of security investigation required to commence work on an ED contract is dictated by the position designation determination assigned by ED. All ED contractor positions are designated commensurate with their position risk/sensitivity, in accordance with Title 5 Code of Federal Regulations (5 CFR 731.I 06) and OPM's Position Designation Tool (PDT) located at: https://pdt.nbis.miV. The position designation determines the risk level and the corresponding level of background investigations required.
- (d) The contractor shall comply with all contractor position designations established by ED.
- (e) The following are the contractor employee positions required under this contract and their designated risk levels:

(Specify HR positions or Insert "Not Applicable") High Risk (HR): Moderate Risk (MR): (Specify MR positions or Insert "Not Applicable") (Specify LR positions or Insert "Not Applicable") Low Risk (LR):

(f) For performance-based contracts where ED has not identified required labor categories for contractor positions, ED considers the risk sensitivity of the services to be performed and the access to ED facilities and systems that will be required during performance, to determine the uniform contractor position risk level designation for all contractor employees who will be providing services wider the contract. The uniform contractor position risk level designation applicable to this performance-based contract is:

(Contracting Officer to complete with overall risk level: or insert "Not Applicable")

- (q) Only U.S. citizens will be eligible for employment on contracts requiring a Moderate Risk/Public Trust, High Risk/Public Trust, or a National Security designation.
- (h) Permanent resident aliens may be eligible for employment on contracts requiring Low Risk/ Public Trust access.
- (i) An approved waiver, in accordance with "Contractor Vetting Security Requirements" is required for any exception to the requirements of paragraphs (g) and (h) above.
- G) The Contractor shall-
 - (1) Comply with the Principal Office (PO) processing requirements for personnel security screening,
 - (2) Ensure that no contractor employee is placed in a higher risk position than for which he or she is approved,
 - (3) Ensure contractor employees submit required security forms for reinvestigation in accordance with the timeframes set forth in the "Contractor Vetting Security Requirements,"
 - (4) Report to the COR any information (i.e., personal conduct, criminal conduct, financial difficulties, etc.) that would raise a concern about the suitability of a contractor or whether a contractor employee's continued employment would promote the efficiency of the service or violate the public trust,
 - (5) Protect sensitive and Privacy Act-protected, including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, from unauthorized access, use or misuse by its contractor employees, prevent unauthorized access by others, and report any instances of unauthorized access, use or misuse to the COR,
 - (6) Report to the COR within two business days any removal of a contractor employee from a contract; or within one business day if removed for cause,
 - (7) Return a PIV ID to the COR within seven business days of the contractor employee's departure,
 - (8) Report to COR of any job activities that contractor employee has brought to their attention that they believe could result in a change in the contractor employee's position or the need for increased security access; and
 - (9) Ensure that any ED information processed, stored, or transmitted by the contractor will not be used or redistributed except as specified in the contract.

H) Performance of this contract will will not	t ☐ involve access to ED IT systems and/or systems
	that require access to ED IT systems and/or systems Security Categorization applicable to each security
Confidentiality: ☐Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Integrity: ☐Low ☐Moderate ☐High	(Contracting Officer to complete)

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Attachment B - Deviated Clause

Availability: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Overall Risk Level: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
(I) Performance of this contract □does involve □does or "Controlled Unclassified Information" as defined in 32 C such information has been determined to be:	•
☐ Not Applicable ☐ Low ☐ Moderate ☐ High	
(m) Failure to comply with any of the personnel, privacy, a result in a termination of the contract for default or cause	
(End of Clause)	

Security Risk Levels Declaration Form (Pre-Award)

This form is to be completed by the program office and submitted as part of the Procurement Package for any procurement involving security risk levels. The most typical reasons for including security risk levels in a contract are when the contractor will have access to Department facilities, Department IT systems, personally identifiable information (PII), sensitive information, or minors (persons under 18 years old). It is the program office's responsibility to identify the appropriate security risk levels (*i.e.*, low, moderate, or high). The program office is encouraged to review Administrative Communications System (ACS) Departmental Directive OM: 5-101 ("Contractor Employee Personnel Security Screenings"), which provides guidance on this issue. The security risk levels identified on this form will be included in EDAR 3452.239-72 Department Security Requirements (MAY 2011/DEVIATION DEC 2019), a contract clause that Contracts and Acquisitions Management (CAM) will include in your solicitation and contract (see Appendix 1 and 2).

Title of Procurement	REGIONAL EDUCATIONAL LABORATORY FY21/FY22 ACQUISITION
Procurement Tracking Number, if applicable	91990020R0032

For each access level or job position necessitating a security risk level, please fill out the boxes below. For each position, identify a risk level (low, medium or high). Samples of position/descriptions could include "Personnel with System Administrator level access to XYZ system," or "Personnel with Supervised access to minors."

		•
Personnel Position or Job Description	Researcher I:	Conducts research, analyzes data, presents result
Risk Level	Moderate	
	-	
Personnel Position or Job Description	Researcher II: Conducts research, analyzes data, presents result	
Risk Level	Low	
Personnel Position or Job Description	Technical Assistance Specialist I: Plans and executes technical	
Risk Level	Moderate	
Personnel Position or Job Description	Technical Assistance Specialist II: Executes technical assistance	
Risk Level	Low	
Amy Johnsor	า	AMY JOHNSON JOHNSON Date: 2022.03.15 13:35:25 -06'00'
Contracting Officer's Rep	presentative	Signature
Leontyne Buffalo	e Minor	LEONTYNE Digitally signed by LEONTYNE MINOR Date: 2022.03.17 12:12:06 -04'00'
Executive Officer		Signature
If the contract includes a	ny Information Tech	hnology (IT):
Computer Security Offic	er	Signature

EDAR 3452.239-72 Department Security Requirements (May 2011)

- (a) The contractor and its subcontractors shall comply with Department security policy requirements as set forth in the "Bidder's Security Package: Security Requirements for Contractors Doing Business with the Department of Education" athttp://www.ed.gov/fund/contract/about/bsp.html.
- (b) The following are the contractor employee positions required under this contract and their designated risk levels:

Personnel Position Job Description	Risk Level
[To be filled in by CAM]	High Risk
[To be filled in by CAM]	Moderate Risk
[To be filled in by CAM]	Low Risk

- (c) All contractor employees must undergo personnel security screening if they will be employed for 30 days or more, in accordance with Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings." The type of screening and the timing of the screening will depend upon the nature of the contractor position, the type of data to be accessed, and the type of information technology (IT) system access required. Personnel security screenings will be commensurate with the risk and magnitude of harm the individual could cause.
- (d) The contractor shall -
 - 1) Ensure that all non-U.S. citizen contractor employees are lawful permanent residents of the United States or have appropriate work authorization documents as required by the Department of Homeland Security, Bureau of Immigration and Appeals, to work in the United States.
 - 2) Ensure that no employees are assigned to high risk designated positions prior to a completed preliminary screening.
 - 3) Submit all required personnel security forms to the contracting officer's representative (COR) within 24 hours of an assignment to a Department contract and ensure that the forms are complete.
 - 4) Ensure that no contractor employee is placed in a higher risk position than that for which he or she was previously approved, without the approval of the contracting officer or the COR, the Department personnel security officer, and the Department computer security officer.
 - 5) Ensure that all contractor employees occupying high-risk designated positions submit forms for reinvestigation every five years for the duration of the contract or if there is a break in service to a Department contract of 365 days or more.
 - 6) Report to the COR all instances of individuals seeking to obtain unauthorized access to any departmental IT system, or sensitive but unclassified and/or Privacy Act protected information.
 - 7) Report to the COR any information that raises an issue as to whether a contractor employee's eligibility for continued employment or access to Department IT systems, or sensitive but unclassified and/or Privacy Act protected information, promotes the efficiency of the service or violates the public trust.
 - 8) Withdraw from consideration under the contract any employee receiving an unfavorable adjudication determination.
 - 9) Officially notify each contractor employee if he or she will no longer work on a Department contract.
 - 10) Abide by the requirements in Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings."
- (e) Further information including definitions of terms used in this clause and a list of required investigative forms for each risk designation are contained in Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings" available at the Web site listed in the first paragraph of this clause.
- (f) Failure to comply with the contractor personnel security requirements may result in a termination of the contract for default.

EDAR 3452.239-72 Department Security Requirements (DEC 2019)

Prescription/or use (applies to, both, 3452.239-71 and 3452.239-72):

3439.702 Department security requirements (DEVIATION).

The contracting officer must include the solicitation provision in 3452.239-71 (DEVIATION) (Notice to offerors of Department security requirements) and the clause at 3452.239-72 (DEVIATION) (Department security requirements) when contractor employees will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (11) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present.

Deviated provision 3452.239-71:

3452.239-71 Notice to offerors of Department security requirements (DEVIATION)

As prescribed in 3439.702, include the following provision in solicitations when the offeror's employees would have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (IT) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present:

Notice to offerors of Department security requirements (DEVIATION)

- (a) The successful contractor must comply with Department of Education personnel, cyber, and privacy security policy requirements as set forth in "Security Requirements for Contractors Doing Business with the Department of Education" at http://www.ed.gov/fund/contract/about/bsp.html.
- (b) Contractor employees who will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, or ED IT systems, systems maintained on behalf of ED, ED facilities or space, and/or perform duties in a school or in a location where children are present, must undergo a personnel security screening and a favorable determination and are subject to reinvestigation as described in the "Contractor Vetting Security Requirements." Compliance with these "Contractor Vetting Security Requirements," is required.
- (c) The type of security investigation required to commence work on an ED contract is dictated by the position designation determination assigned by ED. All ED contractor positions are designated commensurate with their position risk/sensitivity, in accordance with Title S Code of Federal Regulations (5 CFR 731.106) and OPM's Position Designation Tool (PDT) located at: https://pdt.nbis.mil/. The position designation determines the risk level and the corresponding level of background investigations required.
- (d) The contractor shall comply with all contractor position designations established by ED.

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Attachment A - Prescription

(e) The following are the contractor employee positions r designated risk levels:	equired under this contract and their
Moderate Risk (MR): (Specify MR position	ns or Insert "Not Applicable") ns or Insert " Not Applicable") or Insert "Not Applicable")
(t) For performance-based contracts where ED has not ic positions, ED considers the risk sensitivity of the services and systems that will be required during performance, to level designation for all contractor employees who will be uniform contractor position risk level designation application.	to be performed and the access to ED facilities determine the uniform contractor position risk e providing services under the contract. The
(Contracting Officer to complete with overall rise	k level: or insert "Not Applicable")
(g) Only U.S. citizens will be eligible for employment on c Risk/Public Trust, High Risk/Public Trust, or a National S	. 0
(h) Permanent resident aliens may be eligible for employ Trust access.	ment on contracts requiring Low Risk/ Public
(i) An approved waiver, in accordance with "Contractor for any exception to the requirements of paragraph (g)	
(j) Performance of this contract will ☐ will not ☐ involve maintained on behalf of ED. For contracts that require a maintained on behalf of ED, the Information Security Cat objective has been determined to be:	access to ED IT systems and/or systems
Confidentiality: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Integrity: Low Moderate High	(Contracting Officer to complete)
Availability: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Overall Risk Level: ☐Low ☐ Moderate ☐ High	(Contracting Officer to complete)
(k) Performance of this contract ☐ does involve ☐ does not be PTI Confidentiality Impact Level has been determined.	•
□Not Applicable □Low □Moderate □High.	
(End of Provision)	

Deviated clause 3452.239-72:

3452.239-72 Department security requirements. (DEVIATION)

As prescribed in 3439.702, include the following clause in contracts when the contractor's employees will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (IT) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present:

Department Security Requirements (DEVIATION)

- (a) The contractor and its subcontractors shall comply with Department of Education personnel, cyber, and privacy, security policy requirements as set forth in "Security Requirements for Contractors Doing Business with the Department of Education" at http://www.ed.gov/fund/contract/about/bsp.html.
- (b) Contractor employees who will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, or ED IT systems, systems maintained on behalf of ED, ED facilities or space, and/or perform duties in a school or in a location where children are present, must undergo a personnel security screening and a favorable determination and are subject to reinvestigation as described in the "Contractor Vetting Security Requirements." Compliance with these "Contractor Vetting Security Requirements," as amended, is required.
- (c) The type of security investigation required to commence work on an ED contract is dictated by the position designation determination assigned by ED. All ED contractor positions are designated commensurate with their position risk/sensitivity, in accordance with Title 5 Code of Federal Regulations (5 CFR 731.I 06) and OPM's Position Designation Tool (PDT) located at: https://pdt.nbis.miV. The position designation determines the risk level and the corresponding level of background investigations required.
- (d) The contractor shall comply with all contractor position designations established by ED.
- (e) The following are the contractor employee positions required under this contract and their designated risk levels:

(Specify HR positions or Insert "Not Applicable") High Risk (HR): Moderate Risk (MR): (Specify MR positions or Insert "Not Applicable") (Specify LR positions or Insert "Not Applicable") Low Risk (LR):

(f) For performance-based contracts where ED has not identified required labor categories for contractor positions, ED considers the risk sensitivity of the services to be performed and the access to ED facilities and systems that will be required during performance, to determine the uniform contractor position risk level designation for all contractor employees who will be providing services wider the contract. The uniform contractor position risk level designation applicable to this performance-based contract is:

(Contracting Officer to complete with overall risk level: or insert "Not Applicable")

- (q) Only U.S. citizens will be eligible for employment on contracts requiring a Moderate Risk/Public Trust, High Risk/Public Trust, or a National Security designation.
- (h) Permanent resident aliens may be eligible for employment on contracts requiring Low Risk/ Public Trust access.
- (i) An approved waiver, in accordance with "Contractor Vetting Security Requirements" is required for any exception to the requirements of paragraphs (g) and (h) above.
- G) The Contractor shall-
 - (1) Comply with the Principal Office (PO) processing requirements for personnel security screening,
 - (2) Ensure that no contractor employee is placed in a higher risk position than for which he or she is approved,
 - (3) Ensure contractor employees submit required security forms for reinvestigation in accordance with the timeframes set forth in the "Contractor Vetting Security Requirements,"
 - (4) Report to the COR any information (i.e., personal conduct, criminal conduct, financial difficulties, etc.) that would raise a concern about the suitability of a contractor or whether a contractor employee's continued employment would promote the efficiency of the service or violate the public trust,
 - (5) Protect sensitive and Privacy Act-protected, including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, from unauthorized access, use or misuse by its contractor employees, prevent unauthorized access by others, and report any instances of unauthorized access, use or misuse to the COR,
 - (6) Report to the COR within two business days any removal of a contractor employee from a contract; or within one business day if removed for cause,
 - (7) Return a PIV ID to the COR within seven business days of the contractor employee's departure,
 - (8) Report to COR of any job activities that contractor employee has brought to their attention that they believe could result in a change in the contractor employee's position or the need for increased security access; and
 - (9) Ensure that any ED information processed, stored, or transmitted by the contractor will not be used or redistributed except as specified in the contract.

maintained on behalf of ED. For contracts tha	involve access to ED IT systems and/or systems trequire access to ED IT systems and/or systems curity Categorization applicable to each security
Confidentiality: ☐Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Integrity: ☐Low ☐Moderate ☐High	(Contracting Officer to complete)

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Attachment B - Deviated Clause

Availability: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Overall Risk Level: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
(I) Performance of this contract □does involve □does or "Controlled Unclassified Information" as defined in 32 C such information has been determined to be:	•
☐ Not Applicable ☐ Low ☐ Moderate ☐ High	
(m) Failure to comply with any of the personnel, privacy, a result in a termination of the contract for default or caus	
(End of Clause)	

Security Risk Levels Declaration Form (Pre-Award)

This form is to be completed by the program office and submitted as part of the Procurement Package for any procurement involving security risk levels. The most typical reasons for including security risk levels in a contract are when the contractor will have access to Department facilities, Department IT systems, personally identifiable information (PII), sensitive information, or minors (persons under 18 years old). It is the program office's responsibility to identify the appropriate security risk levels (*i.e.*, low, moderate, or high). The program office is encouraged to review Administrative Communications System (ACS) Departmental Directive OM: 5-101 ("Contractor Employee Personnel Security Screenings"), which provides guidance on this issue. The security risk levels identified on this form will be included in EDAR 3452.239-72 Department Security Requirements (MAY 2011/DEVIATION DEC 2019), a contract clause that Contracts and Acquisitions Management (CAM) will include in your solicitation and contract (see Appendix 1 and 2).

Title of Procurement	REGIONAL EDUCATIONAL LABORATORY FY21/FY22 ACQUISITION
Procurement Tracking Number, if applicable	91990020R0032

For each access level or job position necessitating a security risk level, please fill out the boxes below. For each position, identify a risk level (low, medium or high). Samples of position/descriptions could include "Personnel with System Administrator level access to XYZ system," or "Personnel with User level access to XYZ system," or "Personnel with supervised access to minors."

uccess to A12 system, or 1 er.	sonnei wiin Oser ievei ac	cess to A12 system, or 1 ersonnet with supervised access to minors.		
Personnel Position or Job Description	Dissemination Specialist I: Plans and executes the dissemination			
Risk Level	Moderate			
	-			
Personnel Position or Job Description	Dissemination Specialist II: Executes the dissemination strategy			
Risk Level	Low	Low		
	-			
Personnel Position or Job Description	Program Assista	ant I: Provides administrative or project managem		
Risk Level	Low			
Personnel Position or Job Description				
Risk Level				
Amy Johnson	า	AMY JOHNSON Digitally signed by AMY JOHNSON Date: 2022.03.15 13:35:49 -06'00'		
Contracting Officer's Rep	presentative	Signature		
Leontyne Buffaloe Minor		LEONTYNE Digitally signed by LEONTYNE MINOR Date: 2022.03.17 12:11:20 -04'00'		
Executive Officer		Signature		
If the contract includes a	ny Information Tech	nnology (IT):		
Computer Security Offic	er	Signature		

EDAR 3452.239-72 Department Security Requirements (May 2011)

- (a) The contractor and its subcontractors shall comply with Department security policy requirements as set forth in the "Bidder's Security Package: Security Requirements for Contractors Doing Business with the Department of Education" athttp://www.ed.gov/fund/contract/about/bsp.html.
- (b) The following are the contractor employee positions required under this contract and their designated risk levels:

Personnel Position Job Description	Risk Level
[To be filled in by CAM]	High Risk
[To be filled in by CAM]	Moderate Risk
[To be filled in by CAM]	Low Risk

- (c) All contractor employees must undergo personnel security screening if they will be employed for 30 days or more, in accordance with Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings." The type of screening and the timing of the screening will depend upon the nature of the contractor position, the type of data to be accessed, and the type of information technology (IT) system access required. Personnel security screenings will be commensurate with the risk and magnitude of harm the individual could cause.
- (d) The contractor shall -
 - Ensure that all non-U.S. citizen contractor employees are lawful permanent residents of the United States or have appropriate work authorization documents as required by the Department of Homeland Security, Bureau of Immigration and Appeals, to work in the United States.
 - 2) Ensure that no employees are assigned to high risk designated positions prior to a completed preliminary screening.
 - 3) Submit all required personnel security forms to the contracting officer's representative (COR) within 24 hours of an assignment to a Department contract and ensure that the forms are complete.
 - 4) Ensure that no contractor employee is placed in a higher risk position than that for which he or she was previously approved, without the approval of the contracting officer or the COR, the Department personnel security officer, and the Department computer security officer.
 - 5) Ensure that all contractor employees occupying high-risk designated positions submit forms for reinvestigation every five years for the duration of the contract or if there is a break in service to a Department contract of 365 days or more.
 - 6) Report to the COR all instances of individuals seeking to obtain unauthorized access to any departmental IT system, or sensitive but unclassified and/or Privacy Act protected information.
 - 7) Report to the COR any information that raises an issue as to whether a contractor employee's eligibility for continued employment or access to Department IT systems, or sensitive but unclassified and/or Privacy Act protected information, promotes the efficiency of the service or violates the public trust.
 - 8) Withdraw from consideration under the contract any employee receiving an unfavorable adjudication determination.
 - 9) Officially notify each contractor employee if he or she will no longer work on a Department contract.
 - 10) Abide by the requirements in Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings."
- (e) Further information including definitions of terms used in this clause and a list of required investigative forms for each risk designation are contained in Departmental Directive OM:5–101, "Contractor Employee Personnel Security Screenings" available at the Web site listed in the first paragraph of this clause.
- (f) Failure to comply with the contractor personnel security requirements may result in a termination of the contract for default.

EDAR 3452.239-72 Department Security Requirements (DEC 2019)

Prescription/or use (applies to, both, 3452.239-71 and 3452.239-72):

3439.702 Department security requirements (DEVIATION).

The contracting officer must include the solicitation provision in 3452.239-71 (DEVIATION) (Notice to offerors of Department security requirements) and the clause at 3452.239-72 (DEVIATION) (Department security requirements) when contractor employees will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (11) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present.

Deviated provision 3452.239-71:

3452.239-71 Notice to offerors of Department security requirements (DEVIATION)

As prescribed in 3439.702, include the following provision in solicitations when the offeror's employees would have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (IT) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present:

Notice to offerors of Department security requirements (DEVIATION)

- (a) The successful contractor must comply with Department of Education personnel, cyber, and privacy security policy requirements as set forth in "Security Requirements for Contractors Doing Business with the Department of Education" at http://www.ed.gov/fund/contract/about/bsp.html.
- (b) Contractor employees who will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, or ED IT systems, systems maintained on behalf of ED, ED facilities or space, and/or perform duties in a school or in a location where children are present, must undergo a personnel security screening and a favorable determination and are subject to reinvestigation as described in the "Contractor Vetting Security Requirements." Compliance with these "Contractor Vetting Security Requirements," is required.
- (c) The type of security investigation required to commence work on an ED contract is dictated by the position designation determination assigned by ED. All ED contractor positions are designated commensurate with their position risk/sensitivity, in accordance with Title S Code of Federal Regulations (5 CFR 731.106) and OPM's Position Designation Tool (PDT) located at: https://pdt.nbis.mil/. The position designation determines the risk level and the corresponding level of background investigations required.
- (d) The contractor shall comply with all contractor position designations established by ED.

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Attachment A - Prescription

(e) The following are the contractor employee positions r designated risk levels:	equired under this contract and their
Moderate Risk (MR): (Specify MR position	ns or Insert "Not Applicable") ns or Insert " Not Applicable") or Insert "Not Applicable")
(t) For performance-based contracts where ED has not ic positions, ED considers the risk sensitivity of the services and systems that will be required during performance, to level designation for all contractor employees who will be uniform contractor position risk level designation application.	to be performed and the access to ED facilities determine the uniform contractor position risk e providing services under the contract. The
(Contracting Officer to complete with overall risk	k level: or insert "Not Applicable")
(g) Only U.S. citizens will be eligible for employment on c Risk/Public Trust, High Risk/Public Trust, or a National S	
(h) Permanent resident aliens may be eligible for employ Trust access.	ment on contracts requiring Low Risk/ Public
(i) An approved waiver, in accordance with "Contractor for any exception to the requirements of paragraph (g)	• • • • • • • • • • • • • • • • • • • •
(j) Performance of this contract will ☐ will not ☐ involve maintained on behalf of ED. For contracts that require a maintained on behalf of ED, the Information Security Cat objective has been determined to be:	access to ED IT systems and/or systems
Confidentiality: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Integrity: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Availability: ☐Low ☐Moderate ☐ High	(Contracting Officer to complete)
Overall Risk Level: \[\]Low \[\] Moderate \[\] High	(Contracting Officer to complete)
(k) Performance of this contract ☐ does involve ☐ does not be PTI Confidentiality Impact Level has been determine	
□Not Applicable □Low □Moderate □High.	
(End of Provision)	

Deviated clause 3452.239-72:

3452.239-72 Department security requirements. (DEVIATION)

As prescribed in 3439.702, include the following clause in contracts when the contractor's employees will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, ED Information Technology (IT) systems, systems maintained on behalf of ED, ED facilities/space, and/or perform duties in a school or in a location where children are present:

Department Security Requirements (DEVIATION)

- (a) The contractor and its subcontractors shall comply with Department of Education personnel, cyber, and privacy, security policy requirements as set forth in "Security Requirements for Contractors Doing Business with the Department of Education" at http://www.ed.gov/fund/contract/about/bsp.html.
- (b) Contractor employees who will have access to proprietary or sensitive ED information including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, or ED IT systems, systems maintained on behalf of ED, ED facilities or space, and/or perform duties in a school or in a location where children are present, must undergo a personnel security screening and a favorable determination and are subject to reinvestigation as described in the "Contractor Vetting Security Requirements." Compliance with these "Contractor Vetting Security Requirements," as amended, is required.
- (c) The type of security investigation required to commence work on an ED contract is dictated by the position designation determination assigned by ED. All ED contractor positions are designated commensurate with their position risk/sensitivity, in accordance with Title 5 Code of Federal Regulations (5 CFR 731.I 06) and OPM's Position Designation Tool (PDT) located at: https://pdt.nbis.miv. The position designation determines the risk level and the corresponding level of background investigations required.
- (d) The contractor shall comply with all contractor position designations established by ED.
- (e) The following are the contractor employee positions required under this contract and their designated risk levels:

High Risk (HR): (Specify HR positions or Insert "Not Applicable")
Moderate Risk (MR): (Specify MR positions or Insert "Not Applicable")
Low Risk (LR): (Specify LR positions or Insert "Not Applicable")

(f) For performance-based contracts where ED has not identified required labor categories for contractor positions, ED considers the risk sensitivity of the services to be performed and the access to ED facilities and systems that will be required during performance, to determine the uniform contractor position risk level designation for all contractor employees who will be providing services wider the contract. The uniform contractor position risk level designation applicable to this performance-based contract is:

(Contracting Officer to complete with overall risk level: or insert "Not Applicable")

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- (g) Only U.S. citizens will be eligible for employment on contracts requiring a Moderate Risk/Public Trust, High Risk/Public Trust, or a National Security designation.
- (h) Permanent resident aliens may be eligible for employment on contracts requiring Low Risk/ Public Trust access.
- (i) An approved waiver, in accordance with "Contractor Vetting Security Requirements" is required for any exception to the requirements of paragraphs (g) and (h) above.
- G) The Contractor shall-
 - (1) Comply with the Principal Office (PO) processing requirements for personnel security screening,
 - (2) Ensure that no contractor employee is placed in a higher risk position than for which he or she is approved,
 - (3) Ensure contractor employees submit required security forms for reinvestigation in accordance with the timeframes set forth in the "Contractor Vetting Security Requirements,"
 - (4) Report to the COR any information (i.e., personal conduct, criminal conduct, financial difficulties, etc.) that would raise a concern about the suitability of a contractor or whether a contractor employee's continued employment would promote the efficiency of the service or violate the public trust,
 - (5) Protect sensitive and Privacy Act-protected, including "Controlled Unclassified Information" as defined in 32 CFR Part 2002, from unauthorized access, use or misuse by its contractor employees, prevent unauthorized access by others, and report any instances of unauthorized access, use or misuse to the COR,
 - (6) Report to the COR within two business days any removal of a contractor employee from a contract; or within one business day if removed for cause,
 - (7) Return a PIV ID to the COR within seven business days of the contractor employee's departure,
 - (8) Report to COR of any job activities that contractor employee has brought to their attention that they believe could result in a change in the contractor employee's position or the need for increased security access; and
 - (9) Ensure that any ED information processed, stored, or transmitted by the contractor will not be used or redistributed except as specified in the contract.

H) Performance of this contract will \square will not \square involve access to ED IT systems and/or systems maintained on behalf of ED. For contracts that require access to ED IT systems and/or systems maintained on behalf of ED, the Information Security Categorization applicable to each security objective has been determined to be:					
Confidentiality: ☐Low ☐ Moderate ☐ High	(Contracting Officer to complete)				
Integrity: ☐Low ☐Moderate ☐High	(Contracting Officer to complete)				

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Attachment B - Deviated Clause

Availability: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
Overall Risk Level: ☐ Low ☐ Moderate ☐ High	(Contracting Officer to complete)
(I) Performance of this contract □does involve □does or "Controlled Unclassified Information" as defined in 32 C such information has been determined to be:	•
☐ Not Applicable ☐ Low ☐ Moderate ☐ High	
(m) Failure to comply with any of the personnel, privacy, a result in a termination of the contract for default or cause	
(End of Clause)	

7 **ED 003201**

Worksheet for the Spring 2022 Funding Mods

REL: Southeast Contractor: Florida State University Contract Number: 91990022C0014 AP Number: IESP220105AP Please submit this to your COR no later than Friday, April 22nd. Do you have changes in key personnel? \square Yes \boxtimes No. 1) If so, please attach a copy of the request. 2) Do you have a revised deliverables schedule to be added to this mod? \boxtimes Yes \square No. If so, please attach a copy of the request. 3) Do you have changes to your subcontracting plan that have occurred since award that are not yet incorporated into your contract by modification? ☐ Yes ☒ No. If so, please attach a copy of the request. 4) Do you have updated, audited indirect cost rate agreements that need to be adopted and incorporated into the contract? \square Yes \boxtimes No. If so, please attach a copy of the request. 5) Do you have any new subcontractors or changes to previous subcontracting agreements that need to be updated in the Consent to Subcontract contract clause? \square Yes \boxtimes No. If so, please attach a copy of the request. 6) Do you have any other changes to the contract that need to be incorporated into your contract by modification? \boxtimes Yes \square No. If so, please attach a copy of the request or relevant documents. CAM: Please replace the Position Descriptions in this contract with the following: High: none Moderate: Corporate Security Liaison Director Deputy Director

Low:

Researcher II

Researcher I

Principal Investigator I

Dissemination Specialist I

Technical Assistance Specialist II

Technical Assistance Specialist I

Dissemination Specialist II Program Assistant I

New Security Risk Level Designation Forms are attached to the email with this request.

CAM (see contract for the first two bulleted items below):

- SE's period of performance should end on the same date as the other RELs (January 2, 2027) as opposed to the 27th
- Section D Packaging and Marking should list my name and contact information (Janelle <u>Sands/janelle.sands@ed.gov</u>) instead of Erin Pollard's. Same thing for section G
- 7) Your REL gets \$139,213 as part of this contract Mod. This money will be added to the single CLIN that you currently have on your contract and may be used for work under any task or for travel. This will be the last funding Mod until FY23 funds are appropriated to the REL Program.

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AMENDMENT OF SOLICITATION/	MODIFICATION OF	CONTRACT	1. CONTRACT ID COI	DE PAG	SE OF PAGES
AMENDMENT OF SOLICITATION/	WODIFICATION OF	CONTRACT			1 16
2. AMENDMENT/MODIFICATION NUMBER	3. EFFECTIVE DATE	4. REQUISITION/PURCHA	SE REQUISITION NUMBER	5. PROJECT NUMBER (If applicable)
91990022C0014P00001	JUN 01, 2022	EDOIES-2	22-000203		
6. ISSUED BY CODE	CAMPCP	7. ADMINISTERED BY ((If other than Item 6)	CODE	
US Dept of ED-550 12th Street SW - Room 7169 Washington DC 20065		See Block 6			
washington DC 20065					
8. NAME AND ADDRESS OF CONTRACTOR (Number, street	t, county, State and ZIP Code))	(X) 9A. AMENDMENT	OF SOLICITATION NUM	İBER
FLORIDA STATE UNIVERSITY		BLNN4PJC3			
874 TRADITIONS WAY TALLAHASSEE FL 32306	DUNS: 00	J027876 de: 3S772			
77.20 477.0022 7 2 32300	ougo ook	30. 00772	9B. DATED (SEE	ITEM 11)	
			104 MODIFICATI	ON OF CONTRACTIONS	ED AU MADED
			10A. MODIFICATI	ON OF CONTRACT/ORD 91990022C0014	ER NUMBER
			X 10B. DATED (SEE	- ITEM 42)	
CODE 00037876 FA	CILITY CODE		IL IIIOB. DATED (SEE	JAN 24, 2022	
00027676	TEM ONLY ADDITECT	O AMENDMENTS OF	SOLIGITATIONS	JAN 24, 2022	
The above numbered solicitation is amended as set forth	ITEM ONLY APPLIES TO			is not extended.	
Offers must acknowledge receipt of this amendment prior to th	e hour and date specified in th	ne solicitation or as amend	ded, by one of the following	g methods:	
(a) By completing items 8 and 15, and returning or (c) By separate letter or electronic communication which inc	coples of the amendment;				
RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIF	PT OF OFFERS PRIOR TO TH	HE HOUR AND DATE SP	ECIFIED MAY RESULT IN	N REJECTION OF YOUR	OFFER. If
by virtue of this amendment you desire to change an offer alre- communication makes reference to the solicitation and this am				provided each letter or elec	ctronic
12. ACCOUNTING AND APPROPRIATION DATA (If required))			Modification Amour	nt: \$139,213.00
See Schedule			Modificati	on Obligated Amour	
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS	OF CONTRACTS/ORDER	RS. IT MODIFIES THE	CONTRACT/ORDER	NUMBER AS DESCRI	BED IN ITEM 14.
CHECK ONE A. THIS CHANGE ORDER IS ISSUED PURS	UANT TO: (Specify authority)	THE CHANGES SET FO	RTH IN ITEM 14 ARE MAI	DE IN THE CONTRACT O	RDER NUMBER
INTERVIOL					
B. THE ABOVE NUMBERED CONTRACT/OR	RDER IS MODIFIED TO REFI	FCT THE ADMINISTRAT	IVE CHANGES (such as o	changes in paving office, a	uppropriation
data, etc.) SET FORTH IN ITEM 14, PURS	UANT TO THE AUTHORITY (OF FAR 43.103(b).	(000/100	mangoo m paying omoo, a	ppropriation
C. THIS SUPPLEMENTAL AGREEMENT IS E	ENTERED INTO PURSUANT	TO AUTHORITY OF:			
D. OTHER (Specify type of modification and a	uthority)				
FAR 52.243-1 Alternate I, FAR 43					
E. IMPORTANT: Contractor is not x is	required to sign this do	oumont and return	1 conics	to the issuing office	
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organ					•
See Continuation Sheet.	nzou by cor couldn't todamig	o, moraumy construction co	made dadjedt matter imer		
Except as provided herein, all terms and conditions of the docu	ment referenced in Item 9A o	r 10A as heretofore chan	ged remains unchanged a	and in full force and effect	
15A. NAME AND TITLE OF SIGNER (Type or print)	amone rotoronood in itom or co		LE OF CONTRACTING OF		
Dr. Mark Riley, Interim Vice Preside	nt for Research	Joseph Gibbs, contract	specialist		
Dr. Wark May, Internit vice i reduce	THE TOT TROOCUITOTT	202-245-6016 Joseph	n.Gibbs@ed.gov		
	1 150 - 1			1	
15B. CONTRACTOR/OFFEROR Digitally signed by Rose D	15C. DATE SIGNED	16B. UNITED STAT		of worders and anyther	ATE SIGNED
Rose Driber for Mark For Mark Riley, Interim VPI	R	locanh C	Digitally signed by Gibbs		110 2022
Riley, Interim VPR Date: 2022.06.08 17:06:46		Joseph G	DDS Date: 2022.06.09 1	11:33:46 JUN	I 10, 2022
-04'00' (Signature of person authorized to sign)	-	(Sianatu	re of Contracting Officer)		

Previous edition unusable

STANDARD FORM 30 (REV. 11/2016) Prescribed by GSA FAR (48 CFR) 53.243 91990022C0014 | REL Southeast | P00001

The purpose of modification P00001 to contract number 91990022C0014 is

- 1. Provide incremental funding in the amount of \$139,213.00 to CLIN 0001- Base Year
- 2. Incorporate an updated Schedule of Deliverables
- 3. Update 3452.239-72 Department Security Requirements with updated position descriptions and risk designations
- 4. Revise the Period of Performance end date for Option Year 4
- 5. Revise Sections D and G Point of Contact information

In order to affect these changes, the contract id modified in the following manner:

- A. Funding in the amount of \$139,213.00 is added to CLIN 0001- Base Year via Purchase Order number EDOIES-22-000203. Funding applied to this CLIN may be used for work under any task or travel.
- B. A revised Schedule of Deliverables has been incorporated into the contract and attached to this modification.
- C. 3452.239-72 Department Security Requirements is updated to reflect the following Titles and Risk Levels. These Titles and Risk Levels replace those defined in the original award document:

Title	Risk Level
Corporate Security Liaison	Moderate
Director	
Deputy Director	
Principal Investigator I	
Researcher I	
Technical Assistance	
Specialist I	
Dissemination Specialist I	
Researcher II	Low
Technical Assistance	
Specialist II	
Dissemination Specialist II	
Program Assistant I	

- D. The Period of Performance for Option Year 4 is hereby revised from January 23, 2027 to January 2, 2027.
- E. The Point of Contact listed in Sections D and G of the contract is hereby changed from Erin Pollard to Janelle Sands.

Except as provided herein, all other terms and conditions of 91990022C0014 remain unchanged and in full force and effect.

	Case 8:25-cv-01154-BAH Document 46-2	ntinued	06/24/2	E Dago 26 of 26	4
ITEM NO.	Case 8:25-cv-01154-BAH Document 46-2 Supplies/services	QUANTITY	UO/24/2: UNIT	5 Page 36 of 364 UNIT PRICE	AMOUNT
	Contracting Officer: Joseph Gibbs, 202-245-6016, Joseph.Gibbs@ed.gov Primary Contracting Officer Representative: Janelle Sands, 202-245-6786, janelle.sands@ed.gov Alternate Contracting Officer Representative(s): Christopher Boccanfuso, chris.boccanfuso@ed.gov Primary Technical Point of Contact: Janelle Sands, 202-245-6786, janelle.sands@ed.gov Alternate Technical Point(s) of Contact: None				
	(New Line Item)				
0006	REL Southeast	1.00	SE	139,213.00	139,213.00
	Accounting and Appropriation Data: 1100M2022.B.2022.ER000000.RL2.2550A.000.117. 0000.000000 \$139,213.00 PR NUMBER: EDOIES-22-000203				

Table of Contents

	Case 8:25-cv-01154-BAH	Document 46-23	Filed 06/24/25	Page 37 of 364	
SECTION	J LIST OF ATTACHMENTS				
J.1	Revised Schedule of Deliver	ables			. 5

LIST OF ATTACHMENTS

J.1 Revised Schedule of Deliverables

			SCHEDULE OF DELIVERABLES	SLIVERAB	LES			
Deliv	Deliverable #	# 0	Deliverable Name	Draft Date	Submitted	Approved	Final Date Due	Comments
TASK 1-	REL	Manag	- REL Management & Reporting					,
1 .	H		Summary of REL Kickoff Meeting					
	-	1	Summary of REL Kickoff Meeting	NA	NA	NA	2/21/22	No deliverable required
1 . 2		-	Vear 1 Estensory Call 1 Accords	COLLIC	2000/12/0	2/7/2022	2/0/2	
1 . 2 .	-	2			2/18/2022	2/18/2022	2/23/22	
1 . 2 .	-	3		3/7/22	3/4/2022	3/7/2022	3/9/22	
1 . 2 .	-	4	Year 1 March Call 2 Agenda	3/21/22	3/21/2022	3/21/2022	3/23/22	
1 . 2	-	2		\perp	4/4/2022	4/6/2022	4/6/22	
1 . 2 .	-	9		4/18/22	4/18/2022	4/18/2022	4/20/22	
1 .	-	7		5/2/22			5/4/22	
. 7 .		» c		5/16/22			27/81/5	
1 -	-	7 0	Year 1 line Call 2 Agenda	27/07/9			27/0/0	
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1 .	-	77	2	12/19/22			12/21/22	
1 .	-	23		1/10/23			1/12/23	
1 . 2	-	42	1	1			1/26/23	
1 . 2	- -	52		1			2/9/23	
1 .	-	52	12	2/21/23			2/23/23	
. 2 .	-	/7		3/1/23			3/9/23	
. 7 .	-	87 6	Year 2 March Call 2 Agenda	3/21/23			3/23/23	
1 2	-	30		4/18/23			4/20/23	
1 . 2 .	-	31	ľ	5/2/23			5/4/23	
1 . 2 .		32	Ì	5/16/23			5/18/23	
1 . 2 .	-	33		6/6/23			6/8/23	
1 . 2 .	-	8	Year 2 June Call 2 Agenda	6/20/23			6/22/23	
1 . 2 .	7		Bimonthly call memos					
1 .	7 0	- (Year 1 February Call 1	2/16/22	2/11/2022	2/11/2022	2/23/22	
7 .	7 0	7 ,	Year I February Call 2	37/7/5	27.07/2/7	2707/7/5	3/9/22	
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	7 0	4 4	Year I March Call 2	3/30/22	3/23/2022	4/1/2022	4/00/2	
7 6	, , ,	2	Vere 1 April Call 1	4/13/22	4/11/2022	4/13/2022	77/07/2	
, ,	4 6	1 0	Vaca 1 May Call 1	4/2/122			5/19/22	
1 1	4 6	- 0	Veer 1 New Cell 2	5/11/22			27/01/2	
1 -	2 6	0	Year 1 June Call 1	6/15/22			6/22/22	
1 . 2 .	2	10	Year 1 June Call 2	6/29/22			7/6/22	
1 . 2 .	2	11	Year 1 July Call 1	7/20/22			7/27/22	
1 . 2 .	2	12	Year 1 July Call 2	8/3/22			8/10/22	

8/24/22	97/72	9/21/22	10/5/22	10/19/22	11/2/22	11/16/22	11/30/22	12/21/22	12/30/22	1/24/23	2/7/23	2/21/23	3/7/23	3/21/23	4/4/23	4/18/23	5/2/23	5/16/23	5/30/23	6/20/23	7/4/23											2/28/2022		3/4/2022	4/4/2022									5/15/2022	11/30/2022	5/28/2023
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8/17/22	8/31/22	9/14/22	9/28/22	10/12/22	10/26/22	11/9/22	11/23/22	12/14/22	12/23/22	1/17/23	1/31/23	2/14/23	2/28/23	3/14/23	3/28/23	4/11/23	4/25/23	5/9/23	5/23/23	6/13/23	6/27/23		3 weeks	before each	meening	3 weeks before each meeting	2	before each	1	week arter each meeting		5 weeks after	award	2/11/22	3/21/22	3 weeks	before meeting	2 weeks after meeting		3 weeks before meeting	Carpon of our	2 weeks after meeting		4/15/22	10/31/22	4/28/23
Vear 1 August Call 1	Year 1 August Call 2	Year 1 September Call 1	Year 1 September Call 2	Year 1 October Call 1	Year 1 October Call 2	Year 1 November Call 1	Year 1 November Call 2	Year 1 December Call 1	Year 1 December Call 2	Year 2 January Call 1	Year 2 January Call 2	Year 2 February Call 1	Year 2 February Call 2	Year 2 March Call 1	Year 2 March Call 2	Year 2 April Call 1	Year 2 April Call 2	Year 2 May Call 1	Year 2 May Call 2	Year 2 June Call 1	Year 2 June Call 2	Department presentation	Department presentation briefing	materials - Year 2 first meeting		Summary of department presentation - Year 2 first meeting	C	Summary of department presentation - Year 2 second	mooning 5	Summary or department presentation - Year 2 second	Identify, establish, maintain	2	Governing Board	Agenda and materials for Governing Board meeting - Year 1 Spring	Meeting minutes and action items - Year 1 Spring Governing Board	ning		n items -	Agenda and materials for Governing		t	Year 2 Spring Governing Board	Bi-Annual Assessment of	Memo: Bi-Annual Assessment of	Bi-Annual Assessment of Progress	Bi-Annual Assessment of Progress
13	4	15	16	17	18	19	20	21	22	23	24	25	26	27	78	29	30	31	32	33	34		E	1	1	2	Ī	ъ	Ī	4		-1	Ī	1	-	,		2	E	6	Ŧ	3		-1	2	3
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Report	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	Monthly	gim	2	3	4	2	9	7	urity	ity documents	naterials	erials		coordination		-	١,							
Monthly Progress Report	Year 1 February	Year 1 March	Year April	Year 1 June	Year 1 July	Year 1 August	Year 1 September	Year 1 October	Year 1 November	Year 1 December	Year 2 January	Year 2 February	Year 2 March	Year 2 April	Year 2 May	Year 2 June	Performance report 1	Performence report 2	Performance report 3	Performance report 4	Performance report 5	Performance report 6	Performance report 7	Submission of security	Submission of security documents	REL evaluation materials	REL evaluation materials	- Coordination & Collaboration	Lead cross-REL coordination	Cross-REL working group agenda - Year 1 Quarter 2	Cross-REL working group memo -	Cross-REL working group agenda	Year 1 Quarter 3	Cross-REL working group memo -	Teat 1 Quarter 3 Cross-RFI working group agenda -	Year 1 Quarter 4	Cross-REL working group memo - Year 1 Cuarter 4	Cross-REL working group agenda - Year 2 Quarter 1	
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																								partnership materials	under one deliverable for										
		1/15/2023	7/30/2023			5/9/2022	4/13/2023	2/14/2024	4/12/2024			5/31/2022	5/31/2022	5/31/2022	12/30/2022	7/29/2022	7/30/2022	5/31/2022	1/14/2023					<i>,</i> E4	,	5/12/2022	5/12/2022	8/11/2022	8/11/2022	11/10/2022	11/10/2022	2/9/2023	5/11/2023	5/11/2023	8/10/2023
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2 weeks before meeting	2 weeks after meeting	11/30/22	6/30/23			4/25/22	3/30/23	1/31/24	3/29/24			4/29/2022	4/29/2022	4/29/2022	11/30/2022	6/30/2022	6/30/2022	4/29/2022	11/30/2022	As needed; 2 weeks before meeting			4/28/2022	4/28/2022	7/28/2022	7/28/2022	10/27/2022	10/27/2022	1/26/2023	4/27/2023	4/27/2023	7/27/2023			
Cross-REL working group agenda Year 2 Quarter 2	Cross-REL working group memo - 1: Year 2 Quarter 2	ew Proposal	Early Cycle Review Product	Coordinate and collaborate with regional Comprehensive	Centers, other Department	Signed letter(s) of intent with each	Joint needs sensing summary	Annual memo of needs sensing	Joint needs sensing summary	- Working in Partnership with Stakeholders	Conduct needs-sensing and	Partnership ProposalSouth Carolina Professional Learning	Partnership ProposalMississippi	Partnership ProposalAlabama Research Partnership on Improving	Partnership ProposalFlorida K-3	Partnership ProposalFlorida	Partnership ProposalSchool	Partnership ProposalNorth Carolina Competency-Based	Partnership ProposalDiversifying the Educator Pipeline at Historically	Needs sensing meeting materials (Partnership TBD)	Needs sensing meeting materials (Partnership TBD)	Needs sensing meeting materials (Partnership TBD)	Needs sensing meeting materials (Partnership TBD)	Maintain partnerships under subtask 3.1		Partnership meeting materials and	Partnership meeting summary	Partnership meeting materials and	Partnership meeting summary	Partnership meeting materials and	Partnership meeting summary	Partnership meeting materials and	Partnership meeting materials and	Partnership meeting summary	Partnership meeting materials and
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Applied Research and Peer Reviewed Research
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* Evaluating the Implementation of the Emergent Literacy PLC Sarah
\exists
Notice of IRB approval or
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. 5 OMB clearance package (if 9/30/2022
Data sharing agreement
. 7 Research Report 6/30/2025
Concept Paper
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OMB clearance package (if	Data sharing agreement or	Research Report	Toolkit Evaluation: Assisting Students Struggling with Reading: Response to Intervention and Multi-	Proposal Toolkit Evaluation	Notice of IRB approval or	Data Management Plan	OMB clearance package Data sharing agreement or	Research Report	TBD	TBD Year 3 or later	Concept Paper	Proposal	Notice of IRB approval or	OMB clearance package (if	Data sharing agreement or	Research Report	TBD	TBD Year 3 or later	Concept Paper	Proposal	Notice of IKB approval of	OMB clearance nackage (if	Data sharing agreement or	Research Report	TBD	TBD Year 3 or later	Concept Paper	Proposal	Notice of IKB approval of	OMB clearance package (if	Data sharing agreement or	Applied research written product	Toolkit Design: Assisting Students Struggling with	Reading: Response to Proposal Toolkit Development	Toolkit	Memo Documenting changes based on usability testing	Develop Tools to Support Research Processes and	Alabama English Learner Outcomes (ALELO) Robin Jarvis	Concept Paper	Proposal	Notice of IRB approval or	Data Management Plan (if
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Newsletter 8 Nov 2022	Newsletter 9 Dec 2022	Newsletter 10 Jan 2023	Newsletter 11 Feb 2023	Newsletter 12 March 2023	Newsletter 13 April 2023	Newsletter 14 May 2023	Newsletter 15 June 2023	Newsletter 16 July 2023	Maintain a blog	Blog 1	Blog 2	Blog 3	Blog 4	Blog 5	Blog 6	Blog 7	Blog 8	Maintain a social media	Tweet 1 Year 1 Quarter 1	Tweet 2 Year 1 Quarter 2	Tweet 3 Year 1 Quarter 3	Tweet 4 Year 1 Quarter 4	Tweet 5 Year 2 Quarter 1	Tweet 6 Year 2 Quarter 2	Branding Materials	Proposal for video 1	Script and storyboard for video 1	Video 1	Brochure or handout	
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UNITED STATES DEPARTMENT OF EDUCATION Office of Acquisition and Grants Administration Contracts and Acquisitions Management

DATE: June 2, 2022

TO: FILE

FROM: Carlina Smith, Contract Specialist/Contracting Officer

SUBJECT: Incremental Funding and Other Miscellaneous Changes

CONTRACT: 91990022C0014 – Regional Educational Laboratory Southeast

BACKGROUND

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027¹. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

PURPOSE

Modification P00001 makes the following changes to the contract:

- 1. Provide incremental funding in the amount of \$139,213.00 to CLIN 0001- Base Year.
- 2. Incorporate an updated Schedule of Deliverables
- 3. Update 3452.239-72 Department Security Requirements with updated position descriptions and risk designations
- 4. Revise the Period of Performance end date for Option Year 4
- 5. Revise Sections D and G Point of Contact information

¹ REL Southwest is eleven months off-cycle based on an extended protest in 2012 and remains off cycle. The current REL SW contract expires on November 29, 2022. The new REL SW contract will awarded mid-November, 2022.

DESCRIPTION OF CHANGES

- A. Funding in the amount of \$139,213.00 is added to CLIN 0001- Base Year via Purchase Order number EDOIES-22-000203. Funding applied to this CLIN may be used for work under any task or travel. A copy of the Purchase Order is housed in the contract file at the following path: K:\PREVIOUS OCFO\OCFO\CAM\All Contracts\FY21\RELs Recompete FY22-FY27\5. Post Award\2. Modifications\Southeast\Mod package\IESP220105AP (REL Southeast mod) 4.7.22.pdf
- B. REL Southeast proposed updates to its Schedule of Deliverables as some deliverables were no longer required, while others required updated due dates due to ground conditions. The COR approved the updates to the deliverable schedule on April 27, 2022. This modification incorporates the updated deliverable schedule into the current contract. A copy of the Schedule of Deliverables is housed in the contract file at the following path: K:\PREVIOUS OCFO\CAM\All Contracts\FY21\RELs Recompete FY22-FY27\5. Post Award\2. Modifications\Southeast\Mod package\Schedule of Deliverables 2022-04.xlsx
- C. This modification also revises the position and security risk descriptions. These revisions are required to more accurately reflect the labor categories associated with REL work. 3452.239-72 is updated to reflect the following position descriptions and risks:

Title		Risk Level
	Corporate Security Liaison Director Deputy Director Principal Investigator I Researcher I Technical Assistance Specialist I Dissemination Specialist I	Moderate
	Researcher II Technical Assistance Specialist II Dissemination Specialist II Program Assistant I	Low

D. A request was submitted by the COR to revise the Period of Performance end date for Option Year 4 in order to align with the other REL contracts. The CO approved this change. The Period of Performance end date is hereby revised from January 23, 2027 to January 2, 2027. A copy of the requested is housed in the contract file at the following path: K:\PREVIOUS OCFO\OCFO\CAM\All Contracts\FY21\RELs Recompete FY22-

- FY27\5. Post Award\2. Modifications\Southeast\Mod package\IESP220105AP91990022C0014.msg.
- E. The COR requested that the point of contact be changed in Sections D and G of the contract to reflect the correct COR. The COR information was confirmed, and the contract has been revised to reflect Janelle Sands as the point of contract in Sections D and G.

AUTHORITY

Modification P00001 is executed in accordance with the following contract clauses: Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; and FAR 43.103(a)(3) – Mutual Agreement of the Parties.

FUNDING

Incremental funding in the amount of \$139,213.00 is added to CLIN 0001- Base Year via Purchase Order number EDOIES-22-000203.

PERIOD OF PERFORMANCE

This modification revises the period of performance of the final year of the contract. The period of performance is revised from January 24, 2022, through January 23, 2027 to January 24, 2022, through January 2, 2027.

SYNOPSIS

There is no requirement for synopsizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

SCOPE OF WORK

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

RECOMMENDATION

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00001. It is therefore recommended that incremental funding be added to CLIN 0001, and that Key Personnel changes, a revised Schedule of Deliverables,

revised position descriptions and risk designators, a revised end date to the period of performance for Option Year 4 and the COR update be adopted into Contract Number 91990022C0014.

Submitted by:

Digitally signed by **CARLINA** CARLINA SMITH Date: 2022.06.09 **SMITH** 10:34:21 -04'00'

Carlina Smith, Contract Specialist/Contracting Officer

Approved by:

Digitally signed by Joseph Joseph Gibbs

Date: 2022.06.09 11:36:55 Gibbs -04'00'

Joseph Gibbs, Contracting Officer/Team Lead

Contractor Responsibility Assessment for FLORIDA STATE UNIVERSITY 12/6/2022

Legend			
No Issues Found	Potential Issues	Debarred	

Instructions

To view information. Click on the applicable topic listed in the Table of Contents. To return to this page click on the Home icon located in the top right - hand corner of the page.

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Topic	Page			
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SAM - Business Types and Certifications	4			
SAM - Small Business Certifications	5			
SAM - Contractor POC and CAGE Information	6			
SAM - Buy American Certificates and Free Trade Agreements Certificates	7			
FPDS-NG - Summary by Dept / NAICS / PSC	8			
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Market Research	15			
Reps & Certs from SAM	17			



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Combines data from FPDS-NG, FAPIIS, a	and SAM to provide an overview of a vendor's contrac	ting history and co	ertifications.
Vendor	Vendor Address	:	SAM Dates
FLORIDA STATE UNIVERSITY DUNS: ueiSAM: JF2BLNN4PJC3	Tallahassee, FL 32306-0001 Expiration Date: 11/16/2023		
	SAM Warnings as of 12/6/2022 7:40:55 AF	νI	
	Vendor Designations *		True - ✓ False - □
Debarred Vendor Vendor is found to have an existing debarme	nt record. The next page provides details		
Debt Subject to Offset			
	n that has any unpaid Federal tax liability that has been assess en exhausted or have lapsed, and that is not being paid in a ti		
52.209-11.b.2 - convicted of a felony, last 2 The Offeror represents that it is a corporatio the preceding 24 months.	years n that was convicted of a felony criminal violation under a Fed	deral law within	
52.209-5.a.1.i.A - presently debarred The Offeror certifies, to the best of its knowledbarment, or declared ineligible for the away			
52.209-5.a.1.i.B - criminal offense, last 3 y The Offeror certifies, to the best of its knowle been convicted of or had a civil judgment rer with obtaining, attempting to obtain, or perf. Federal or State antitrust statutes relating to bribery, falsification or destruction of records receiving stolen property.			
52.209-5.a.1.i.C - presently indicted The Offeror certifies, to the best of its knowle civilly charged by a governmental entity with provision			
52.209-5.a.1.i.D - federal tax delinquency, la The Offeror certifies, to the best of its knowle been notified of any delinquent Federal taxes.			
52.209-5.a.1.ii - term for default, last 3 year . The Offeror has, within a three-year period p Federal agency.			
FAR 52.204-26.c.1 and/or 52.212-3.v.2.i Cov The Offeror represents that it does provide of products or services to the Government in the			
FAR 52.204-26.c.2 and/or 52.212-3.v.2.ii Condition After conducting a reasonable inquiry for put telecommunications equipment or services, equipment or services.			
Vendor has at least one FAPIIS record or FPI			



*See Appendix A for what is required for each of the above SAM designations.

FDC_VendorReport - Cover Contractor: FLORIDA STATE UNIVERSITY

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

FAPIIS Summary			
Record Type	Count		
Administrative Agreement	0		
Defective Pricing	0		
DoD Determination of Contractor Fault	0		
Information on Trafficking in Persons	0		
Non-Responsibility Determination	0		
Recipient Not-Qualified Determination	0		
Subcontractor Payment Issues	0		
Termination for Cause	0		
Termination for Default	0		
Termination for Material Failure to Comply	0		

FAPIIS Details					
Record Type	PIID	Ref PIID	Recorded On		
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No Data to Display

	FPDS Details	
Record Type	PIID	Recorded On

No Data to Display

FPDS-NG data, from the prior five years, is accurate as of 12/4/2022 & and all historical FAPIIS data is accurate as of 12/6/2022 5:04:01 AM

Disclaimer

If adverse action is considered as a result of information in this report it is recommended that contracting personnel: 1) per FAR 9.104-5 promptly request additional, possibly clarifying information from the offeror, and 2) validate the information in SAM, FAPIIS and/or FPDS-NG for accuracy and recency.

This Report is based on data and information obtained from U.S. federal databases, including the Federal Procurement Data System – Next Generation database and the System for Award Management database. This Report is provided "as is". FedDataCheck and PotomacWave Consulting Inc. make no representation or warranty, express, implied or otherwise, as to the accuracy or completeness of the data and information contained in this Report. Any alert or warning identified in this Report should be independently verified -- per FAR 9.104-5(a)(1) and per FAR 9.104-5(b)(1) requests for additional information from the offeror should be made promptly. To the extent any alert or warning identified in this Report contains or may contain an error or inaccuracy, the relevant U.S. federal agency should be contacted to correct such error or inaccuracy. FedDataCheck and PotomacWave Consulting Inc. shall have no liability to any party resulting from the use of, or content contained in, this Report, and any action taken by (or omission of) a party relying on this Report shall be the sole responsibility of such party.



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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.						
	Self Certified Business Types					
Business Type	SAM Glossary I	SAM Glossary Definition				
Business or Organization						
Educational Institution						
Non-Profit Organization		_	n organization that uses its surplus revenues to ac The IRS defines this status under Internal Revenue	•	than distribute	
State Controlled Institution of Higher Learning	Institution of					
Certified Business Types						
Business	Туре	Certified By		Last Verified Date / Entry Date	Expiration Date / Exit Date	
	No Results					
Certified Business Types include Small Business Administration and VetBiz validations.						



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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Small Business Representations

The Small Business Administration (SBA), through public rule-making, assigns thresholds to the individual NAICS codes that are used to assess if entities may be considered a small business in certain classification areas. The below list shows business size classifications by NAICS code for this vendor in SAM.gov.

NAICS Code	NAICS desc	Exception String	Small Business*
541330	Engineering Services	NNNN	N
541713	Research and Development in Nanotechnology		N
541714	Research and Development in Biotechnology (except Nanobiotechnology)		N
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	NNNN	N
541720	Research and Development in the Social Sciences and Humanities		N
611310	Colleges, Universities, and Professional Schools		N

^{*} Small Business Size is determined by the values in SAM for each NAICS unless there is an exception. In that case, the size is determined by: all Y in exception string then it is a small business; all N in exception string then it is not a small business; and a combination of Y and N will result in an Unknown (U) business size.



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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.						
Vendor Contact Information from SAM						
Contact Type	Name	Phone / Fax	Email	Address		
Accounts Payable	Angela Rowe	8506448659 /	arrowe@FSU.EDU	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306		
Accounts Receivable	Angela Rowe	8506448659 /	arrowe@FSU.EDU	,		
Alternate Electronic Business	EILEEN CAMPANALE	8506450384 / 8506441464	ECAMPANALE@FSU.EDU	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306		
Alternate Government Business	EILEEN CAMPANALE	8506450384 / 8506441464	ECAMPANALE@FSU.EDU	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306		
Alternate Past Peformance	Russell Lentz	8506445260 / 8506441464	rlentz@FSU.EDU	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306		
EDI	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	,		
Electronic Business	Esther Wheeler	8506448675 / 8506441464	SRA-PRE@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306		
Eliminations	Esther Wheeler	8506445260 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306		
Government Business	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306		
Party Peforming Certification	Esther Wheeler	8506445260 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306		
Past Peformance	Russell Lentz	8506448649 / 8506441464	rlentz@fsu.edu	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306		
Sales	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306		
Sole Prop	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	,		
		Vendor Cage In	formation from SAM			
DUNS + 4	Cage	Address Type		Address		

vendor Cage Information from SAIVI				
DUNS + 4 Cage Address Type		Address Type	Address	
-	3\$772	Physical	874 Traditions Way, Tallahassee, FL 32306 - 0001	
- 35772 Mailing		Mailing	874 TRADITIONS WAY, TALLAHASSEE, FL 32306 - 4166	



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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Buy American Certificates and Trade Agreements Certificates

Foreign End Product Response (52.212-3.f)

Are any end products delivered to the Government by FLORIDA STATE UNIVERSITY foreign (nondomestic) end products?

Vendor will provide information with specific offers to the Government

Foreign End Products Supplied by Vendor as designated in SAM

The following are end products that the contractor has designated in SAM that are sourced from a foreign country. A check mark signifies the contractor has included that product in their FAR response to that section in SAM. FAR 52.212.3.f refers to Buy American Certificates and FAR 52.212.3.g refers to Buy American and/or Trade Agreements Certificates.

End Product Country

No End Products in SAM

Please reference FAR 52.212-3 for guidance



FDC_VendorReport - EndProducts Contractor: FLORIDA STATE UNIVERSITY

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.						
Vendor Awards with Civilian Agencies: FPDS-NG Overview for Current and the Prior Fiscal Year						
US Contracting Department	Obligated Amount	Transactions				
Agency For International Development	\$403,412	1				
Commerce	\$10,000	6				
Education	\$5,228,196	2				
Interior	\$41,113	8				
National Aeronautics And Space Administration	\$40,000	1				
Veterans Affairs	\$60,000	2				
NAICS	Obligated Amount	Transactions				
483114 - Coastal and Great Lakes Passenger Transportation	\$0	4				
541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	\$70,000	4				
541990 - All Other Professional, Scientific, and Technical Services	\$16,611	5				
611310 - Colleges, Universities, and Professional Schools	\$64,502	4				
611710 - Educational Support Services	\$5,631,608	3				
PSC	Obligated Amount	Transactions				
AR11 - R&D- Space: Aeronautics/Space Technology (Basic Research)	\$40,000	1				
AZ11 - R&D- Other Research And Development (Basic Research)	\$60,000	2				
B526 - Special Studies/Analysis- Oceanological	(\$2,540)	4				
B529 - Special Studies/Analysis- Scientific Data	\$10,000	2				
F020 - Natural Resources/Conservation- Fisheries Resources Management	\$0	4				
R499 - Support- Professional: Other	\$5,228,196	2				
R799 - Support- Management: Other	\$24,502	3				
U008 - Education/Training- Training/Curriculum Development	\$403,412	1				



W020 - Lease Or Rental Of Equipment- Ship And Marine

Equipment

\$19,150

1

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS-NG Details (Most recent 25 transactions shown)										
Contracting Department	Contract Identification Info	Date Signed	Obligated Amount	NAICS & PSC	Contract description on base award					
Interior	140D0421P0124 P00003	11/02/2022	\$0	NAICS: 611310 - Colleges, Universities, and Professional Schools PSC: R799 - Support- Management: Other	RECRUITING SERVICES - FLORIDA STATE UNIVERSITY					
Agency For International Development	72061220P00001 P00002	09/26/2022	\$403,412	NAICS: 611710 - Educational Support Services PSC: U008 - Education/Training- Training/Curriculum Development	TECHNICAL ASSISTANCE FOR NATIONAL READING PROGRAM (NRP)IMPLEMENTATION AND EXPANSION					
National Aeronautics And Space Administration	80NSSC22PB528 0	08/08/2022	\$40,000	NAICS: 611310 - Colleges, Universities, and Professional Schools PSC: AR11 - R&D- Space: Aeronautics/Space Technology (Basic Research)	FLORIDA STATE UNIVERSITY (FSU) HAS DEVELOPED A NEW PROPRIETARY SOA PARTIAL DISCHARGE AND EROSION TEST METHOD AND NEW EROSION TESTING AND ANALYSIS OF GRC ELECTRIC INSULATION NANO COMPOSITES.					
Interior	140D0421P0124 P00002	06/27/2022	\$24,502	NAICS: 611310 - Colleges, Universities, and Professional Schools PSC: R799 - Support- Management: Other	RECRUITING SERVICES - FLORIDA STATE UNIVERSITY					
Education	91990022C0014 P00001	06/09/2022	\$139,213	NAICS: 611710 - Educational Support Services PSC: R499 - Support- Professional: Other	REL SOUTHEAST REGION AWARD.					
Commerce	1305M220PNFFN0463 P22003	05/11/2022	\$10,000	NAICS: 541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) PSC: B529 - Special Studies/Analysis- Scientific Data	SHARK PUPPING SURVEYS					
Commerce	1333MF21PNFFN0135 P22002	04/26/2022	\$0	NAICS: 483114 - Coastal and Great Lakes Passenger Transportation PSC: F020 - Natural Resources/Conservation- Fisheries Resources Management	VESSEL CHARTER WITH CRUISING SPEED OF AT LEAST 10 KNOTS FOR DEPLOYMENT AND RETRIEVAL OF STATIONARY VIDEO CAMERAS AND FISH TRAPPING					
Interior	140G0122P0075 0	03/31/2022	\$19,150	NAICS: 541990 - All Other Professional, Scientific, and Technical Services PSC: W020 - Lease Or Rental Of Equipment- Ship And Marine Equipment	UNOLS R/V APALACHEE RENTAL					
Interior	140G0121P0330 P00004	03/09/2022	(\$2,540)	NAICS: 541990 - All Other Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis- Oceanological	UNOLS R/V APALACHEE RENTAL					



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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications. Vendor Awards with Civilian Agencies: FPDS-NG Details (Most recent 25 transactions shown) Contracting **Contract Identification** Obligated Contract description on base **Date Signed NAICS & PSC Amount** Department Info award Commerce 1333MF21PNFFN0022 01/31/2022 \$0 NAICS: 483114 - Coastal and Great NORTHERN GULF OF MEXICO P22004 Lakes Passenger Transportation RESEARCH CRUISE PSC: F020 - Natural Resources/Conservation-Fisheries Resources Management Education 91990022C0014 0 01/24/2022 \$5,088,983 NAICS: 611710 - Educational Support REL SOUTHEAST REGION AWARD. Services PSC: R499 - Support- Professional: Other 140D0421P0124 P00001 \$0 NAICS: 611310 - Colleges, **RECRUITING SERVICES - FLORIDA** Interior 01/10/2022 Universities, and Professional STATE UNIVERSITY PSC: R799 - Support- Management: Other Interior 12/16/2021 \$0 NAICS: 541990 - All Other UNOLS R/V APALACHEE RENTAL 140G0121P0330 P00003 Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis-Oceanological \$0 NAICS: 483114 - Coastal and Great NORTHERN GULF OF MEXICO Commerce 1333MF21PNFFN0022 12/15/2021 RESEARCH CRUISE Lakes Passenger Transportation P22003 PSC: F020 - Natural Resources/Conservation-Fisheries Resources Management 1305M220PNFFN0463 11/29/2021 \$0 NAICS: 541715 - Research and SHARK PUPPING SURVEYS Commerce P22002 Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) PSC: B529 - Special Studies/Analysis-Scientific Data 140G0121P0330 P00001 11/17/2021 \$0 NAICS: 541990 - All Other UNOLS R/V APALACHEE RENTAL Interior Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis-Oceanological Interior 140G0121P0330 P00002 11/17/2021 \$0 NAICS: 541990 - All Other UNOLS R/V APALACHEE RENTAL Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis-Oceanological \$0 NAICS: 483114 - Coastal and Great Commerce 1333MF21PNFFN0135 11/16/2021 VESSEL CHARTER WITH CRUISING Lakes Passenger Transportation P22001 SPEED OF AT LEAST 10 KNOTS FOR PSC: F020 - Natural DEPLOYMENT AND RETRIEVAL OF Resources/Conservation-Fisheries STATIONARY VIDEO CAMERAS AND



FISH TRAPPING

Resources Management

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications. Vendor Awards with Civilian Agencies: FPDS-NG Details (Most recent 25 transactions shown) Contracting **Contract Identification** Obligated Contract description on base **Date Signed NAICS & PSC** Department Info **Amount** award Veterans Affairs 36C26320C0036 P00007 10/29/2021 \$30,000 NAICS: 541715 - Research and RESEARCH AND DEVELOPMENT IOWA Development in the Physical, CITY VA HEALTH CARE SYSTEMS, BASE Engineering, and Life Sciences PLUS 2 OPTION YEARS. (except Nanotechnology and Biotechnology) PSC: AZ11 - R&D- Other Research And Development (Basic Research) RESEARCH AND DEVELOPMENT IOWA **Veterans Affairs** 36C26320C0036 P00006 10/01/2021 \$30,000 NAICS: 541715 - Research and Development in the Physical, CITY VA HEALTH CARE SYSTEMS, BASE Engineering, and Life Sciences PLUS 2 OPTION YEARS. (except Nanotechnology and Biotechnology) PSC: AZ11 - R&D- Other Research And Development (Basic Research) Veterans Affairs 36C26320C0036 P00005 08/27/2021 \$0 NAICS: 541715 - Research and RESEARCH AND DEVELOPMENT IOWA Development in the Physical, CITY VA HEALTH CARE SYSTEMS, BASE Engineering, and Life Sciences PLUS 2 OPTION YEARS. (except Nanotechnology and Biotechnology) PSC: AZ11 - R&D- Other Research And Development (Basic Research) Interior 140G0121P0330 0 08/16/2021 \$16,900 NAICS: 541990 - All Other UNOLS R/V APALACHEE RENTAL Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis-Oceanological **RECRUITING SERVICES - FLORIDA** 07/26/2021 Interior 140D0421P0124 0 \$23,795 NAICS: 611310 - Colleges, Universities, and Professional STATE UNIVERSITY Schools PSC: R799 - Support- Management: Other Commerce 1333MF21PNFFN0135 0 07/01/2021 \$38,750 NAICS: 483114 - Coastal and Great VESSEL CHARTER WITH CRUISING Lakes Passenger Transportation SPEED OF AT LEAST 10 KNOTS FOR PSC: F020 - Natural DEPLOYMENT AND RETRIEVAL OF Resources/Conservation-Fisheries STATIONARY VIDEO CAMERAS AND

Resources Management

Resources Management

PSC: F020 - Natural

\$8,400 NAICS: 483114 - Coastal and Great

Lakes Passenger Transportation

Resources/Conservation-Fisheries

Only displaying up to 25 most recent transactions for the vendor from the past 5 years.

1333MF21PNFFN0022

P21002

06/22/2021



Commerce

FISH TRAPPING

RESEARCH CRUISE

NORTHERN GULF OF MEXICO

<u>FPDS-NG – FAR references involving adverse information</u>

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Appendix A						
SAM Designation	If Box Has a Check Mark	Source				
Debarred Vendor	If a box has a check mark and is associated with Debarred Vendor see below exclusion details. Ineligible (Proceedings Pending) Nature (Cause) Preliminary ineligible based upon adequate evidence of conduct indicating a lack of business honesty or integrity, or a lack of business integrity, or regulation, statute, executive order or other legal authority, pending completion of an	SAM Exclusion Types				
	investigation and/or legal proceedings; or based upon initiation of proceedings to determine final ineligibility based upon regulation, statute, executive order or other legal authority or a lack of business integrity or a preponderance of the evidence of any other cause of a serious and compelling nature that it affects present responsibility. Effect Procurement:					
	Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so. Nonprocurement:					
	No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined preliminary ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The termination date will be listed as "Indefinite" (Indef.) unless otherwise specified.					
	Ineligible (Proceedings Completed) Nature (Cause) Determined ineligible upon completion of administrative proceedings establishing by preponderance of the evidence of a cause of a serious and compelling nature that it affects present responsibility; or determined ineligible based on other regulation, statute, executive order or other legal authority. Effect					
	Procurement: Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so. Nonprocurement:					
	No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The period of ineligibility is specified by the termination date.					
	Prohibition/Restriction Nature (Cause) May be subject to sanctions pursuant to the conditions imposed by the U.S. Department of the Treasury (Treasury) Office of Foreign Assets Control (OFAC), or subject to a sanction, restriction or partial denial pursuant to the conditions imposed by the U.S. Department of State (STATE) or Federal agency of the U.S. Government. Effect					
	If you think you have a potential match with an OFAC listing, please visit the following section of OFAC's website for guidance: http://www.treasury.gov/resource-center/faqs/Sanctions/Pages/directions.aspx. For all other prohibitions and restrictions, see the agency note in the Additional Comments field to ascertain the extent or limit on the sanction, restriction or partial denial. If there is no note, contact the agency taking the action for this information.					
	Voluntary Exclusion Nature (Cause) Accepted an agreement to be excluded under the terms of a settlement between the person and one or more agencies. Effect These persons are excluded in assertlance with the terms of their voluntary exclusion agreement. See the agency note in the					
	These persons are excluded in accordance with the terms of their voluntary exclusion agreement. See the agency note in the Additional Comments field to ascertain the extent of the exclusion of the limit on the person's participation, in covered transactions. If there is no note, contact the agency taking the action for this information.					



 ${\tt FDC_VendorReport\text{-}HowToWithFAR}$

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications. 52.204-26 or If a box has a check mark and is associated with FAR 52.204-26 or FAR 52.212-3.v.2 Federal Register Citation 52.212-3.v.2 Federal Register Citation 85 FR 42665 85 FR 42665 I. Background. Section 889(a)(1)(B) of the John S. McCain National Defense Authorization Act (NDAA) for Fiscal Year 2019 (Pub. L. 115–232) prohibits executive agencies from entering into, or extending or renewing, a contract with an entity that uses any FAR 4.2103 equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. The provision goes into effect August 13, 2020. FAR 4.2103 (a)(1)(i) If the offeror selects "does not" in response to the provision at 52.204-26 or 52.212-3(v), the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures. FAR 4.2103 (a)(1)(ii) If the offeror selects "does" in response to the provision at 52.204-26 or 52.212-3(v), the offeror must complete the representation at 52.204-24. FAR 4.2103 (a)(2)(i) If the offeror selects "will not" in paragraph (d) of the provision at 52.204-24, the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures. FAR 4.2103 (a)(2)(ii) If an offeror selects "will" in paragraph (d) of the provision at 52.204-24, the offeror must provide the information required by paragraph 52.204-24(e), and the contracting officer shall follow agency procedures. FAR 4.2103 (b) Reporting. If a contractor provides a report pursuant to paragraph (d) of the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment, follow agency procedures. Debt Subject to If a box has a check mark and is associated with Debt Subject to Offset FAR 32.1108 • FAR 32.1108(b)(2)(i) When it is contemplated that the Governmentwide commercial purchase card will be used as the method Offset of payment, and the contract or order is above the micro-purchase threshold, contracting officers are required to verify by looking in the System for Award Management (SAM) whether the contractor has any delinquent debt subject to collection under the Treasury Offset Program (TOP) at contract award and order placement. Information on TOP is available at http://fms.treas.gov/debt/index.html. • FAR 32.1108(b)(2) (ii) The contracting officer shall not authorize the Governmentwide commercial purchase card as a method of payment during any period the SAM indicates that the contractor has delinquent debt subject to collection under the TOP. In such cases, payments under the contract shall be made in accordance with the clause at 52.232-33, Payment by Electronic Funds Transfer-System for Award Management, or 52.232-34, Payment by Electronic Funds Transfer-Other Than System for Award Management, as appropriate (see FAR 32.1110(d)). • FAR 32.1108(b)(2) (iii) Contracting officers shall not use the presence of the SAM debt flag indicator to exclude a contractor from receipt of the contract award or issuance or placement of an order. • FAR 32.1108(b)(2) (iv) The contracting officer may take steps to authorize payment by Governmentwide commercial purchase card when a contractor alerts the contracting officer that the SAM debt flag indicator has been changed to no longer show a delinguent debt. If a box has a check mark and is associated with FAR 52.209-11 FAR 9.104-5(b) 52.209-11 • FAR 9.104-5(b)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405); FAR 9.104-5(b) (2) Notify, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action; and FAR 9.104-5(b) (3) Not award to the corporation unless an agency suspending or debarring official has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government. If a box has a check mark and is associated with FAR 52,209-5 FAR 9.104-5(a) 52.209-5 • FAR 9.104-5(a)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405); and • FAR 9.104-5(a)((2) Notify, prior to proceeding with award, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action, where an offeror indicates the existence of an indictment, charge, conviction, or civil judgment, or Federal tax delinquency in an amount that exceeds \$3,500.



FDC VendorReport-HowToWithFAR

Market Research





Utilizes data from GSA eLibrary to provide contracting vehicles for the contractor

Vendor GSA eLibrary Information											
Source	Title	Contract Number	T&Cs /Pricelist	Contract End Date	Category	View Catalog					

No Data to Report



Reps & Certs from SAM



Certification for: FLORIDA STATE UNIVERSITY

Unique Entity ID: JF2BLNN4PJC3

Certification Validity From: Wed Nov 16 15:00:00 EST 2022 **Certification Validity To:** Thu Nov 16 15:00:00 EST 2023

I have read each of the FAR and DFARS provisions presented on this page. By submitting this certification, I, **Esther Wheeler**, am attesting to the accuracy of the representations and certifications contained herein, including the entire NAICS table. I understand that I may be subject to criminal prosecution under Section 1001, Title 18 of the United States Code or civil liability under the False Claims Act if I misrepresent **FLORIDA STATE UNIVERSITY** in any of these representations or certifications to the Government.

By maintaining an active entity registration in SAM, the entity complied with requirements to report proceedings data in accordance with:

- FAR 52.209-7 Information Regarding Responsibility Matters and with requirements to report executive compensation data in accordance with
- FAR 52.204-10 Reporting Executive Compensation and First-Tier Subcontract Awards.

READ ONLY PROVISIONS

FAR 52.203-11

Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions

(Sep 2007)

- (a) Definitions. As used in this provision-"Lobbying contact" has the meaning provided at 2 U.S.C. 1602(8). The terms "agency," "influencing or attempting to influence," "officer or employee of an agency," "person," "reasonable compensation," and "regularly employed" are defined in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12).
- (b) Prohibition. The prohibition and exceptions contained in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12) are hereby incorporated by reference in this provision.
- (c) Certification. The offeror, by signing its offer, hereby certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on its behalf in connection with the awarding of this contract.
- (d) Disclosure. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.
- (e) Penalty. Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by 31 U.S.C. 1352. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure required to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

(End of Provision)

ED 003241

Case 8:25-cProhibitions on Contracting with Entities that Require Lertain Page 72 of 364

FAR 52.203-18

Internal Confidentiality Agreements or Statements-

(JAN 2017)

Representation

As prescribed in 3.909–3(a), insert the following provision: Prohibition on Contracting With Entities That Require Certain Internal Confidentiality Agreements or Statements-Representation (JAN 2017)

- (a) Definition. Internal confidentiality agreement or statement, subcontract, and subcontractor, as used in this provision, are defined in the clause at 52.203-19, Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements.
- (b) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use funds appropriated (or otherwise made available) for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.
- (c) The prohibition in paragraph (b) of this provision does not contravene requirements applicable to Standard Form 312, (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartmented Information Nondisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.
- (d) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).

(End of Provision)

FAR 52.222-38 Compliance with Veterans' Employment Reporting Requirements

(Feb 2016)

As prescribed in 22.1310 (c), insert the following provision:

COMPLIANCE WITH VETERANS' EMPLOYMENT REPORTING REQUIREMENTS (Feb 2016)

By submission of its offer, the offeror represents that, if it is subject to the reporting requirements of 38 U.S.C. 4212(d) (i.e., if it has any contract containing Federal Acquisition Regulation clause 52.222-37, Employment Reports on Veterans), it has filed the most recent VETS-4212 Report required by that clause.

(End of Provision)

FAR 52.222-56 Certification Regarding Trafficking in Persons Compliance Plan

(Oct 2020)

As prescribed in 22.1705(b), insert the following provision:

CERTIFICATION REGARDING TRAFFICKING IN PERSONS COMPLIANCE PLAN (Oct 2020)

- (a) The term "commercially available off-the-shelf (COTS) item," is defined in the clause of this solicitation entitled "Combating Trafficking in Persons" (FAR clause 52.222-50).
- (b) The apparent successful Offeror shall submit, prior to award, a certification, as specified in paragraph (c) of this provision, for the portion (if any) of the contract that-
 - (1) Is for supplies, other than commercially available off-the-shelf items, to be acquired outside the United States, or services to be performed outside the United States; and
 - (2) Has an estimated value that exceeds \$550,000.

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- (1) It has implemented a compliance plan to prevent any prohibited activities identified in paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons, and to monitor, detect, and terminate the contract with a subcontractor engaging in prohibited activities identified at paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons; and
- (2) After having conducted due diligence, either-
 - (i) To the best of the Offeror's knowledge and belief, neither it nor any of its proposed agents, subcontractors, or their agents is engaged in any such activities; or
 - (ii) If abuses relating to any of the prohibited activities identified in 52.222-50(b) have been found, the Offeror or proposed subcontractor has taken the appropriate remedial and referral actions.

FAR 52.223-1 Biobased Product Certification (May 2012)

(a) As required by the Farm Security and Rural Investment Act of 2002 and the Energy Policy Act of 2005 (7 U.S.C. 8102(c)(3)), the offeror certifies, by signing this offer, that biobased products (within categories of products listed by the United States Department of Agriculture in 7 CFR part 3201, subpart B) to be used or delivered in the performance of the contract, other than biobased products that are not purchased by the offeror as a direct result of this contract, will comply with the applicable specifications or other contractual requirements.

(End of Provision)

FAR 52.225-20 Prohibition on Conducting Restricted Business Operations in Sudan-Certification (Aug 2009)

(a) Definitions. As used in this provision-

"Business operations" means engaging in commerce in any form, including by acquiring, developing, maintaining, owning, selling, possessing, leasing, or operating equipment, facilities, personnel, products, services, personal property, real property, or any other apparatus of business or commerce.

"Marginalized populations of Sudan" means-

- (1) Adversely affected groups in regions authorized to receive assistance under section 8(c) of the Darfur Peace and Accountability Act (Pub. L. 109-344) (50 U.S.C. 1701 note); and
- (2) Marginalized areas in Northern Sudan described in section 4(9) of such Act.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007(Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

- (1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;
- (2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;
- (3) Consist of providing goods or services to marginalized populations of Sudan;
- (4) Consist of providing goods or services to an internationally recognized peacekeeping force 003243

- (5) Consist of providing goods or services that are used only to promote health or education; or
- (6) Have been voluntarily suspended
- (b) Certification. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.

Prohibition on Contracting with Entities Engaging in Certain

FAR 52.225-25 Activities or Transactions Relating to Iran - Representation and Certifications (Jun 2020)

(a) Definitions. As used in this provision-

"Person"

- (1) Means-
 - (i) A natural person;
 - (ii) A corporation, business association, partnership, society, trust, financial institution, insurer, underwriter, guarantor, and any other business organization, any other nongovernmental entity, organization, or group, and any governmental entity operating as a business enterprise; and
 - (iii) Any successor to any entity described in paragraph (1)(ii) of this definition; and
- (2) Does not include a government or governmental entity that is not operating as a business enterprise.

"Sensitive technology"-

- (1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-
 - (i) To restrict the free flow of unbiased information in Iran; or
 - (ii) To disrupt, monitor, or otherwise restrict speech of the people of Iran; and
- (2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).
- (b) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.
- (c) Except as provided in paragraph (d) of this provision or if a waiver has been granted in accordance with 25.703-4, by submission of its offer, the offeror-
 - (1) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran;
 - (2) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act. These sanctioned activities are in the areas of development of the petroleum resources of Iran, production of refined petroleum products in Iran, sale and provision of refined petroleum products to Iran, and contributing to

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- (3) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx).
- (d) Exception for trade agreements. The representation requirement of paragraph (c)(1) and the certification requirements of paragraphs (c)(2) and (c)(3) of this provision do not apply if-
 - (1) This solicitation includes a trade agreements notice or certification (e.g., 52.225-4, 52.225-6, 52.225-12, 52.225-24, or comparable agency provision); and
 - (2) The offeror has certified that all the offered products to be supplied are designated country end products or designated country construction material.

(End of Provision)

FAR 52.227-6 Royalty Information (Alternate I)

(Apr 1984)

- (a) Cost or charges for royalties. When the response to this solicitation contains costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:
 - (1) Name and address of licensor.
 - (2) Date of license agreement.
 - (3) Patent numbers, patent application serial numbers, or other basis on which the royalty is payable.
 - (4) Brief description, including any part or model numbers of each contract item or component on which the royalty is payable.
 - (5) Percentage or dollar rate of royalty per unit.
 - (6) Unit price of contract item.
 - (7) Number of units.
 - (8) Total dollar amount of royalties.
- (b) Copies of current licenses. In addition, if specifically requested by the Contracting Officer before execution of the contract, the offeror shall furnish a copy of the current license agreement and an identification of applicable claims of specific patents.

ALTERNATE I (APR 1984)

Substitute the following for the introductory portion of paragraph (a) of the basic clause: When the response to this solicitation covers charges for special construction or special assembly that contain costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:

(End of Provision)

PROVISIONS POPULATED BASED ON REGISTRATION DATA

FAR 52.203-2 Certificate of Independent Price Determination

(Apr 1985)

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- (1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
- (2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and
- (3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.
- (b) Each signature on the offer is considered to be a certification by the signatory that the signatory-
 - (1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; or

(2)

- (i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision Rose Driber, Assistant Director, Sponsored Research Administration; Russell Lentz, Associate Director, Sponsored Research Administration; Pam Ray, Director, Sponsored Research Administration; Stacey Patterson, Vice President for Research;
- (ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) of this provision have not participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; and
- (iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision.
- (c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

(End of Provision)

FAR 52.204-3 Taxpayer Identification (Oct 1998)

(a) Definitions

"Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member.

"Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a SocialSecurity Number or an Employer Identification Number.

(b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting contract is subject to the **FB PR3246** orting

requirements described 1 feter Adduisited Regulation 4 (PAR) 4.90 F, Host and 12 A 25 usal Bage offer of talk nish the information may result in a 31 percent reduction of payments otherwise due under the contract. (c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN. (d) Taxpayer Identification Number (TIN). * **✓** TIN on file. * \square TIN has been applied for. * TIN is not required because: * ☐ Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States; * Offeror is an agency or instrumentality of a foreign government; * Offeror is an agency or instrumentality of the Federal Government. (e) Type of organization. * □ sole proprietorship;

* ☐ Partnership;

* ☐ Corporate entity (not tax-exempt);

* ☐ Corporate entity (tax-exempt);

* Government entity (Federal, State, or local);

* ☐ Foreign government;

* ☐ International organization per 26 CFR 1.6049-4;

* ✓ Other Public Institution of Higher Education

(f) Common parent.

* Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision. Name and TIN of common parent: Name: **(blank)**

TIN: (blank)

(End of Provision)

FAR 52.204-5 Women-Owned Business (Other Than Small Business)

(Oct 2014)

(a) Definition. "Women-owned business concern," as used in this provision, means a concern that is at least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51 percent of its stock is owned by one or more women; and whose management and daily business operations are controlled by one or more women.

(b) Representation. [Complete only if the offeror is a women-owned business concern and has not represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business Program Representations, of this solicitation.] The offeror represents that it □ is a women-owned business concern.

(End of Provision)

FAR 52.204-17 Ownership or Control of Offeror

(Aug 2020)

(a) Definition. As used in this provision--

Commercial and Government Entity (CAGE) code means--

(1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government

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(2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or by the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

Highest-level owner means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

Immediate owner means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

- (b) The Offeror represents that it **DOES NOT** have an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if applicable, paragraph (d) of this provision for each participant in the joint venture.*
- (c) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:

Immediate owner CAGE code: **(blank)**Immediate owner legal name: **(blank)**(Do not use a "doing business as" name)

Is the immediate owner owned or controlled by another entity? ☐ Yes ☐ No

(d) If the Offeror indicates "yes" in paragraph (c) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information:

Highest-level owner CAGE code: **(blank)**Highest-level owner legal name: **(blank)**(Do not use a "doing business as" name)

(End of Provision)

FAR 52.204-20 Predecessor of Offeror (Aug 2020)

(a) Definitions. As used in this provision--

"Commercial and Government Entity (CAGE) code" means--

- (1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government entity by unique location; or
- (2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary, depending on State law and specific circumstances.



(c) If the Offeror has indicated "is" in paragraph (b) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years (if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: (blank)

(or mark "Unknown").

Predecessor legal name: (blank)

(Do not use a "doing business as" name)

(End of Provision)

FAR 52.204-26	Covered Telecommunications Equipment or Services -	(Oct 2020)
	Representation	(000 2020)

- (a) Definitions. As used in this provision, "covered telecommunications equipment or services" and "reasonable inquiry" have the meaning provided in the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.
- (b) Procedures. The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (https://www.sam.gov) for entities excluded from receiving federal awards for "covered telecommunications equipment or services."

(c)

- (1) Representation. The Offeror represents that it **② DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.
- (2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it, **② DOES NOT** use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

(End of Provision)

FAR 52.209-2 Prohibition on Contracting with Inverted Domestic Corporations(Nov 2015)

- (a) Definitions. "Inverted domestic corporation" and "subsidiary" have the meaning given in the clause of this contract entitled Prohibition on Contracting with Inverted Domestic Corporations (52.209-10).
- (b) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.
- (c) Representation. the offeror represents that-
 - (1) It **S IS NOT** an inverted domestic corporation; and
 - (2) It S IS NOT a subsidiary of an inverted domestic corporation.

(End of Provision)

FAR 52.209-5 Certification Regarding Responsibility Matters (Aug 2020)

(a)



- (i) The Offeror and/or any of its Principals-
 - (A) **3 ARE NOT** presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;
 - (B) **S HAVE NOT**, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) contract or subcontract; violation of Federal or State antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property(if offeror checks "have", the offeror shall also see 52.209-7, if included in this solicitation);
 - (C) **S ARE NOT** presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.
 - (D) **A HAVE NOT**, within a three-year period preceding this offer, been notified of any delinquent Federal Taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.
 - (1) Federal taxes are considered delinquent if both of the following criteria apply:
 - (i) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
 - (ii) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(2) Examples:

- (i) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.
- (ii) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C. 6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.
- (iii) The taxpayer has entered into an installment agreement pursuant to

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the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.

- (iv) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under 11 U.S.C 362 (the Bankruptcy Code).
- (ii) The Offeror, **② HAS NOT**, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.
- (2) "Principal," for the purposes of this certification, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a division or business segment; and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.
- (b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.
- (d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- (e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

(End of Provision)

FAR 52.209-11

Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law

(Feb 2016)

- (a) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-
 - (1) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or
 - (2) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the integrate of the corporation.



- (b) The Offeror represents that-
 - (1) It **S IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and
 - (2) It **S IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

FAR 52.212-3

Offeror Representations and Certifications - Commercial Products and Commercial Services

(Nov 2021)

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.212-3(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.212-3(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

The Offeror shall complete only paragraph (b) of this provision if the Offeror has completed the annual representations and certifications electronically in the System for Award Management (SAM) accessed through https://www.sam.gov. If the Offeror has not completed the annual representations and certifications electronically, the Offeror shall complete only paragraphs (c) through (v) of this provision.

(a) Definitions. As used in this provision-

"Covered telecommunications equipment or services" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Economically disadvantaged women-owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127. It automatically qualifies as a women-owned small business eligible under the WOSB Program.

"Forced or indentured child labor" means all work or service-

- (1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or
- (2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.

"Highest-level owner" means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

"Immediate owner" means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

"Inverted domestic corporation", means a foreign incorporated entity that meets the definition of an inverted domestic corporation under 6 U.S.C. 395(b), applied in accordance with the rules and the finitions of the corporation under 6 U.S.C. 395(b), applied in accordance with the rules and the finitions of the corporation under 6 U.S.C. 395(b), applied in accordance with the rules and the finition of the corporation under 6 U.S.C. 395(b).

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"Manufactured end product" means any end product in product and service codes (PSCs) 1000-9999, except-

- (1) PSC 5510, Lumber and Related Basic Wood Materials;
- (2) Product or Service Group (PSG) 87, Agricultural Supplies;
- (3) PSG 88, Live Animals;
- (4) PSG 89, Subsistence;
- (5) PSC 9410, Crude Grades of Plant Materials;
- (6) PSC 9430, Miscellaneous Crude Animal Products, Inedible;
- (7) PSC 9440, Miscellaneous Crude Agricultural and Forestry Products;
- (8) PSC 9610, Ores;
- (9) PSC 9620, Minerals, Natural and Synthetic; and
- (10) PSC 9630, Additive Metal Materials.

"Place of manufacture" means the place where an end product is assembled out of components, or otherwise made or processed from raw materials into the finished product that is to be provided to the Government. If a product is disassembled and reassembled, the place of reassembly is not the place of manufacture.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Reasonable inquiry" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007 (Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

- (1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;
- (2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;
- (3) Consist of providing goods or services to marginalized populations of Sudan;
- (4) Consist of providing goods or services to an internationally recognized peacekeeping force or humanitarian organization;
- (5) Consist of providing goods or services that are used only to promote health or education; or
- (6) Have been voluntarily suspended.

"Sensitive technology"-

- (1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-
 - (i) To restrict the free flow of unbiased information in Iran; or

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(2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).

"Service - disabled veteran - owned small business concern"

- (1) Means a small business concern-
 - (i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans; and
 - (ii) The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.
- (2) Service-disabled veteran means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

- (1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria in 13 CFR part 121 and size standards in this solicitation.
- (2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern", consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that-

- (1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-
 - (i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States; and
 - (ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and
- (2) The management and daily business operations of which are controlled (as defined at 13.CFR 124.106) by individuals, who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Subsidiary" means an entity in which more than 50 percent of the entity is owned

- (1) Directly by a parent corporation; or
- (2) Through another subsidiary of a parent corporation.

"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary, depending on State law and specific circumstances.

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- (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127), means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States.

"Women-owned small business concern" means a small business concern-

- (1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

(b)

- (1) Annual Representations and Certifications. Any changes provided by the Offeror in paragraph (b)(2) of this provision do not automatically change the representations and certifications in SAM.
- (2) The Offeror has completed the annual representations and certifications electronically in SAM accessed through https://www.sam.gov. After reviewing SAM information, the Offeror verifies by submission of this offer that the representations and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications-Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), at the time this offer is submitted and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs ________.

 [Offeror to identify the applicable paragraphs at (c) through (v) of this provision that the offeror has completed for the purposes of this solicitation only, if any.

These amended representation(s) and/or certification(s) are also incorporated in this offer and are current, accurate, and complete as of the date of this offer.

Any changes provided by the offeror are applicable to this solicitation only, and do not result in an update to the representations and certifications posted electronically on SAM.]

(c) Offerors must complete the following representations when the resulting contract is to be performed inside the United States or its outlying areas. Check all that apply.

If no NAICS table is displayed, this registrant may not be considered a small business.

- (1) *Small business concern. The offeror represents as part of its offer that it, **② IS NOT** a small business concern.
- (2) *Veteran-owned small business concern. The offeror represents as part of its offer that it, **② IS NOT** a veteran-owned small business concern.
- (3) *Service-disabled veteran-owned small business concern. The offeror represents as part of its offer that it, **S IS NOT** a service-disabled veteran-owned small business concern.
- (4) Small disadvantaged business concern. The offeror represents, that it ☐ is, ☐ is not a small disadvantaged business concern as defined in 13 CFR 124.1002.
- (5) *Women-owned small business concern. The offeror represents that it, **♥ IS NOT** a women-owned small business concern.

(6) CAROSB: 255TEVIT QUALITATE TO THE WOSSELFING PATH A COARPLET HAVE TO BE 25 FEB 30 CEVIT QUALITATE TO THE SEGRED FOR A SECRETARY OF THE SEGRED FOR A SECRETARY OF THE SEGRED FOR A SECRETARY OF THE SEGRED FOR A SECRETARY OF THE SEGRED FOR A SECRETARY OF THE SEGRED FOR A SECRETARY OF THE SEGRED FOR A SECRETARY OF THE SEGRED FOR A SECRETARY OF THE SECRETARY OF T women-owned small business concern in paragraph (c)(5) of this provision] The offeror represents that: (i) It ☐ is, ☐ is not a WOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(6)(i) of this provision is accurate in reference to the WOSB concern or concerns that are participating in the joint venture. [The offeror shall enter the name or names of the WOSB concern or concerns that are participating in the joint venture:] Each WOSB concern participating in the joint venture shall submit a separate signed copy of the WOSB representation. (7) **Economically disadvantaged women-owned small business (EDWOSB) concern. [Complete only if the offeror represented itself as a WOSB concern eligible under the WOSB Program in (c)(6) of this provision.] The offeror represents that: (i) It ☐ is, ☐ is not an EDWOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It ☐ is, ☐ is not a joint venture that complies withthe requirements of 13 CFR part 127, and the representation in paragraph (c)(7)(i) of this provision is accurate for each EDWOSB concern participating in the joint venture. [The offeror shall enter the name or names of the EDWOSB concern and other small businesses that are participating in the joint venture: .] Each EDWOSB concern participatingin the joint venture shall submit a separate signed copy of the EDWOSB representation. Note: Complete paragraphs (c)(8) and (c)(9) only if this solicitation is expected to exceed the simplified acquisition threshold. (8) Women-owned business concern (other than small business concern). [Complete only if the offeror is a women-owned business concern and did not represent itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents that it \square is a women-owned business concern. (9) Tie bid priority for labor surplus area concerns. If this is an invitation for bid, small business offerors may identify the labor surplus areas in which costs to be incurred on account of manufacturing or production (by offeror or first-tier subcontractors) amount to more than 50 percent of the contract price: State Eligible Labor Surplus: (blank) Civil Jurisdictions Included: (blank) (10) HUBZone small business concern. The offeror represents as part of its offer, that-(i) It 🐼 IS NOT a HUBZone small business concern listed, on the date of this representation, on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration, and no material change in ownership and control, principal office, or HUBZone employee percentage has occurred since it was certified in accordance with 13 CFR part 126; and (ii) It **3 IS NOT** a HUBZone joint venture that complies with the requirements of 13 CFR part 126, and the representation in paragraph (c)(11)(i) of this provision is accurate for each HUBZone small business concern participating in the HUBZone joint venture. [The offeror shall enter the names of each of the HUBZone small business concerns participating in

(d) Representations required to implement provisions of Executive Order 11246-

shall submit a separate signed copy of the HUBZone representation.

the HUBZone joint venture: .] Each HUBZone small business concern participating in the joint venture



- (i) It **HAS** participated in a previous contract or subcontract subject to the Equal Opportunity clause of this solicitation; and
- (ii) It **☑ HAS** filed all required compliance reports.
- (2) Affirmative Action Compliance. The offeror represents that-
 - (i) It **HAS DEVELOPED AND HAS ON FILE**, It at each establishment, affirmative action programs required by rules and regulations of the Secretary of Labor (41 cfr parts 60-1 and 60-2), or
 - (ii) It \square has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.
- (e) Certification Regarding Payments to Influence Federal Transactions (31 U.S.C. 1352). (Applies only if the contract is expected to exceed \$150,000.) By submission of its offer, the offeror certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress or an employee of a Member of Congress on his or her behalf in connection with the award of any resultant contract. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.
- (f) Buy American Certificate. (Applies only if the clause at Federal Acquisition Regulation (FAR)52.225-1, Buy American-Supplies, is included in this solicitation.)

(1)

- (i) The Offeror certifies that each end product, except those listed in paragraph (f)(2) of this provision, is a domestic end product.
- (ii) The Offeror shall list as foreign end products those end products manufactured in the United States that do not qualify as domestic end products.
- (iii) The terms "domestic end product," "end product," "foreign end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Supplies."
- (2) Foreign End Products: (blank)
- (3) The Government will evaluate offers in accordance with the policies and procedures of FAR Part 25.

(g)

(1) Buy American-Free Trade Agreements-Israeli Trade Act Certificate. (Applies only if the clause at FAR52.225-3, Buy American-Free Trade Agreements-Israeli Trade Act, is included in this solicitation.)

(i)

- (A) The Offeror certifies that each end product, except those listed in paragraph (g)(1)(ii) or
- (iii) of this provision, is a domestic end product.
 - (B) The terms "Bahrainian, Moroccan, Omani, Panamanian, or Peruvian end product," "domestic end product," "end product," "foreign end product," "Free Trade Agreement country," "Free Trade Agreement country end product," "Israeli end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act."
- (iii) The offeror shall list those supplies that are foreign end products (other than those list ₱03257

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American-Free Trade Agreements-Israeli Trade Act." The offeror shall list as other foreign end products those end products manufactured in the United States that do not qualify as domestic end products.

Other Foreign End Products: (blank)

- (iv) The Government will evaluate offers in accordance with the policies and procedures of FAR Part 25.
- (2) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate I. If Alternate I to the clause at FAR 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:
- (g)(1)(ii) The offeror certifies that the following supplies are Canadian end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act": Canadian End Products: **(blank)**
- (3) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate II. If Alternate II to the clause at FAR 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:
- (g)(1)(ii) The offeror certifies that the following supplies are Canadian end products or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act": Canadian or Israeli End Products: (blank)
- (4) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate III. If Alternate III to the clause at 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:
- (g)(1)(ii) The offeror certifies that the following supplies are Free Trade Agreement country end products (other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian end products) or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Free Trade Agreement Country End Products (Other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian End Products) or Israeli End Products: (**blank**)

- (5) Trade Agreements Certificate. (Applies only if the clause at FAR 52.225-5, Trade Agreements, is included in this solicitation.)
 - (i) The offeror certifies that each end product, except those listed in paragraph (g)(5)(ii) of this provision, is a U.S.-made or designated country end product, as defined in the clause of this solicitation entitled "Trade Agreements."
 - (ii) The offeror shall list as other end products those end products that are not U.S.-made or designated country end products.

Other End Products: (blank)

- (iii) The Government will evaluate offers in accordance with the policies and procedures of FAR Part25. For line items covered by the WTO GPA, the Government will evaluate offers of U.S.-made or designated country end products without regard to the restrictions of the Buy American statute. The Government will consider for award only offers of U.S.-made or designated country end products unless the Contracting Officer determines that there are no offers for such products or that the offers for such products are insufficient to fulfill the requirements of the solicitation.
- (h) Certification Regarding Responsibility Matters (Executive Order 12689). (Applies only if the contract value is expected to exceed the simplified acquisition threshold.) The offeror certifies, to the best of its knowledge and belief, that the offeror and/or any of its principals-





- (2) SHAVE NOT, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a Federal, state or local government contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property;
- (3) **SARE NOT** presently indicted for, or otherwise criminally or civilly charged by a Government entity with, commission of any of these offenses enumerated in paragraph (h)(2) of this clause; and
- (4) **EXECUTE** HAVE NOT within a three-year period preceding this offer, been notified of any delinquent Federal taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.
 - (i) Taxes are considered delinquent if both of the following criteria apply:
 - (A) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
 - (B) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(ii) Examples:

- (A) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court Review, this will not be a final tax liability under the taxpayer has exercised all judicial appeal rights.
- (B) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C.6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the tax payer has exercised all judicial appeal rights.
- (C) The taxpayer has entered into an installment agreement pursuant to I.R.C.6159. The taxpayer is making timely payments and is in full compliance with the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.
- (D) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under II U. S. C 362 (the Bankruptcy Code).
- (i) Certification Regarding Knowledge of Child Labor for Listed End Products (Executive Order 13126). [The Contracting Officer must list in paragraph (i)(1) any end products being acquired under this solicitation that are included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, unless excluded at 22.1503(b).]
 - (1) Listed end products.



Case Listed End Products BAH	Document 46-23 List Ed edung / 24/25 gin Page 90 of 364
Bamboo	Burma
Beans (green, soy, yellow)	Burma
Brazil Nuts/Chestnuts	Bolivia
Bricks	Afghanistan, Burma, China, India, Nepal, Pakistan
Carpets	Nepal, Pakistan
Cattle	South Sudan
Cassiterite	Democratic Republic of Congo
Coal	Pakistan
Coca (stimulant plant)	Colombia
Cocoa	Cote d'Ivoire, Nigeria
Coffee	Cote d'Ivoire
Coltan	Democratic Republic of Congo
Cotton	Benin, Burkina Faso, China, Tajikistan, Uzbekistan
Cottonseed (hybrid)	India
Diamonds	Sierra Leone
Dried Fish	Bangladesh
Electronics	China
Embroidered Textiles (zari)	India, Nepal
Fish	Ghana
Garments	Argentina, India, Thailand, Vietnam
Gold	Burkina Faso, Democratic Republic of Congo
Granite	Nigeria
Gravel (crushed stones)	Nigeria
Pornography	Russia
Rice	Burma, India, Mali
Rubber	Burma
Shrimp	Thailand
Stones	India, Nepal
Sugarcane	Bolivia, Burma
Teak	Burma
Textiles (hand-woven)	Ethopia
Tilapia (fish)	Ghana
Tobacco	Malawi
Toys	China
Wolframite	Democratic Republic of Congo

- (2) Certification. [If the Contracting Officer has identified end products and countries of origin in paragraph (i)(1) of this provision, then the offeror must certify to either (i)(2)(i) or (i)(2)(ii) by checking the appropriate block.]
 - (i) \blacksquare The offeror will not supply any end product listed in paragraph (i)(1) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product.
 - (ii) ☐ The offeror may supply an end product listed in paragraph (i)(1) of this provision tha **ED**a**603260**

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certifies that it has made a good faith effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture any such end product furnished under this contract. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

- (j) Place of Manufacture(Does not apply unless the solicitation is predominantly for the acquisition of manufactured end products.) For statistical purposes only, the offeror shall indicate whether the place of manufacture of the end products it expects to provide in response to this solicitation is predominantly-
 - (1) In the United States (Check this box if the total anticipated price of offered end products manufactured in the United States exceeds the total anticipated price of offered end products manufactured outside the United States); or
 - (2) Outside the United States.

FCC Code	Diago Of Manufacture
FSC Code	Place Of Manufacture

- (k) Certificates regarding exemptions from the application of the Service Contract Labor Standards (Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services.) [The contracting officer is to check a box to indicate if paragraph (k)(1) or (k)(2) applies.]
 - (1) Maintenance, calibration, or repair of certain equipment as described in FAR 22.1003-4(c)(1). The offeror **© DOES NOT** certify that __
 - (i) The items of equipment to be serviced under this contract are used regularly for other than Governmental purposes and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontract) in substantial quantities to the general public in the course of normal business operations;
 - (ii) The services will be furnished at prices which are, or are based on, established catalog or market prices (see FAR 22.1003-4(c)(2)(ii)) for the maintenance, calibration, or repair of such equipment; and
 - (iii) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract will be the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.
 - (2) Certain services as described in FAR 22.1003-4(d)(1). The offeror, ② DOES NOT certify that ___
 - (i) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;
 - (ii) The contract services will be furnished at prices that are, or are based on, established catalog or market prices (see FAR 22.1003-4(d)(2)(iii));
 - (iii) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and
 - (iv) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract is the same as that used for these employees and equivalent employees servicing commercial customers.
 - (3) If paragraph (k)(1) or (k)(2) of this clause applies ____
 - (i) If the offeror does not certify to the conditions in paragraph (k)(1) or (k)(2) and the Contracting

 Officer did not attach a Service Contract Labor Standards wage determination to the solic ED: 603261

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- (ii) The Contracting Officer may not make an award to the offeror if the offeror fails to execute the certification in paragraph (k)(1) or (k)(2) of this clause or to contact the Contracting Officer as required in paragraph (k)(3)(i) of this clause.
- (l) Taxpayer Identification Number (TIN) (26 U.S.C. 6109, 31 U.S.C. 7701). (Not applicable if the offeror is required to provide this information to SAM to be eligible for award.)
 - (1) All offerors must submit the information required in paragraphs (l)(3) through (l)(5) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the Internal Revenue Service (IRS).
 - (2) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN.

payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with
IRS records to verify the accuracy of the offeror's TIN.
(3) Taxpayer Identification Number (TIN).
* ☑ TIN on file.
* ☐ TIN has been applied for.
*TIN is not required because:
* ☐ Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income
effectively connected with the conduct of a trade or business in the United States and does not have an office
or place of business or a fiscal paying agent in the United States;
* ☐ Offeror is an agency or instrumentality of a foreign government;
[*] ☐ Offeror is an agency or instrumentality of the Federal Government.
(4) Type of organization.
*□sole proprietorship;
*□Partnership;

- * ☐ Corporate entity (not tax-exempt);
- * ☐ Corporate entity (tax-exempt);
- * ☐ Government entity (Federal, State, or local);
- * ☐ Foreign government;
- * ☐ International organization per 26 CFR 1.6049-4;
- * Other Public Institution of Higher Education
- (5) Common parent.
- * ☑ Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision.
- * Name: (blank)

TIN: (blank)

- (m) Restricted business operations in Sudan. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.
- (n) Prohibition on Contracting with Inverted Domestic Corporations.
 - (1) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.
 - (2) Representation. the offeror represents that-
 - (i) It S IS NOT an inverted domestic corporation; and



- (o) Prohibition on contracting with entities engaging in certain activities or transactions relating to Iran.
 - (1) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.
 - (2) Representation and Certifications. Unless a waiver is granted or an exception applies as provided in paragraph (o)(3) of this provision, by submission of its offer, the offeror-
 - (i) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran;
 - (ii) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act; and
 - (iii) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx).
 - (3) The representation and certification requirements of paragraph (o)(2) of this provision do not apply if-
 - (i) This solicitation includes a trade agreements certification (e.g., 52.212-3(g) or a comparable agency provision); and
 - (ii) The offeror has certified that all the offered products to be supplied are designated country end products.
- (p) Ownership or Control of Offeror. (Applies in all solicitations when there is a requirement to be registered in SAM or a requirement to have a unique entity identifier in the solicitation.)
 - (1) The Offeror represents that it **DOES NOT** have an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if applicable, paragraph (d) of this provision for each participant in the joint venture.*

(2) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:
Immediate owner CAGE code: (blank)
Immediate owner legal name: (blank)
(Do not use a "doing business as" name)
Is the immediate owner owned or controlled by another entity? ☐ Yes ☐ No
(3) If the Offeror indicates "yes" in paragraph (p)(2) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information: Highest-level owner CAGE code: Highest-level owner legal name: (blank) (Do not use a "doing business as" name)

- (q) Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law.
 - (1) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L.113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-





remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or

- (ii) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the interests of the Government.
- (2) The Offeror represents that-
 - (i) It **② IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and
 - (ii) It **S IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.
- (r) Predecessor of Offeror. (Applies in all solicitations that include the provision at 52.204-16, Commercial and Government Entity Code Reporting.)
 - (1) The Offeror represents that it **S IS NOT** a successor to a predecessor that held a Federal contract or grant within the last three years.
 - (2) If the Offeror has indicated "is" in paragraph (r)(1) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years (if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: (blank)

(or mark "Unknown").

Predecessor legal name: (blank)

(Do not use a "doing business as" name)

- (s) Reserved.
- (t) Public Disclosure of Greenhouse Gas Emissions and Reduction Goals. Applies in all solicitations that require offerors to register in SAM (12.301(d)(1)).
 - (1) This representation shall be completed if the Offeror received \$7.5 million or more in contract awards in the prior Federal fiscal year. The representation is optional if the Offeror received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.
 - (2) Representation. [Offeror to check applicable block(s) in paragraph (t)(2)(i) and (ii)].
 - (i) The Offeror (itself or through its immediate owner or highest-level owner) **DOES** publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.
 - (ii) The Offeror (itself or through its immediate owner or highest-level owner) **② DOES NOT** publicly disclose a quantitative greenhouse gas emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.

Case Builder Cassiste Website in Ducks the Offebruson Weisst 26/24/25 nized, again 95 tof 364 greenhouse gas emissions reporting program.



(3) If the Offeror checked "does" in paragraphs (t)(2)(i) or (t)(2)(ii) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported: **https:**

//ghgdata.epa.gov/ghgp/service/facilityDetail/2021?id=1005785&ds=E&et=&popup=true (blank)

(u)

- (1) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.
- (2) The prohibition in paragraph (u)(1) of this provision does not contravene requirements applicable to Standard Form 312 (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartmented Information Nondisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.
- (3) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).
- (v) Covered Telecommunications Equipment or Services Representation. Section 889(a)(1) and Section 889(a)(1)(B) of Public Law 115-232.
 - (1) The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (https://www.sam.gov) for entities excluded from receiving federal awards for "covered telecommunications equipment or services".
 - (2) The Offeror represents that-
 - (i) It **② DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.
 - (ii) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it, **② DOES NOT** use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

Alternate I (Oct 2014)

☐ Hispanic American.

As prescribe	ed in 12.301(b)(2), add the followi	ing paragraph (c)(11) to the	the basic provision:	
	mplete if the offeror has represen American.	nted itself as disadvantag	ged in paragraph (c)(4) of this	provision.)
_ Diack	. Tillericani			

🗖 Native American (American Indians, Eskimos, Aleuts, or Native Hawaiia	ans).
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□ASSERS: AMEDIAL THE BAIS WITH DOUBLE THE HOME HOME AND A STATE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOME AND A STATE OF THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOUSE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOLD THE BAIS WITH DOUBLE HOUSE WITH DOUBLE HO
Brunei, Japan, China, Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, The Philippines, Republic of
Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern
Mariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu, or Nauru).
☐ Subcontinent Asian (Asian-Indian) American (persons with origins from India, Pakistan, Bangladesh, Sri
Lanka, Bhutan, the Maldives Islands, or Nepal).
☐ Individual/concern, other than one of the preceding.

FAR 52.214-14

Place of Performance-Sealed Bidding

(Apr 1985)

- (a) The bidder, in the performance of any contract resulting from this solicitation, , ** DOES NOT INTEND [check applicable box] to use one or more plants or facilities located at a different address from the address of the bidder as indicated in this bid.
- (b) If the bidder checks "intends" in paragraph (a) of this provision, it shall insert in the spaces provided below the required information:

Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

(End of Provision)

FAR 52.215-6 Place of Performance

(Oct 1997)

- (a) The offeror or respondent, in the performance of any contract resulting from this solicitation, **© DOES NOT INTEND** [check applicable block] to use one or more plants or facilities located at a different address from the address of the offeror or respondent as indicated in this proposal or response to request for information.
- (b) If the offeror or respondent checks "intends" in paragraph (a) of this provision, it shall insert in the following spaces the required information:

Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

(End of Provision)

FAR 52.219-1

Small Business Program Representations

(Nov 2020)

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.219-1(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.219-1(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

(a) Definitions. As used in this provision-

"Economically disadvantaged women-owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127. It automatically qualifies as a women-owned small business concern eligible under the WOSB Program.

"Service-disabled veteran-owned small business concern"

- (1) Means a small business concern-
 - (i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is 003266

Page 26 of 35



- (ii) The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.
- (2) "Service-disabled veteran" means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

- (1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria in 13 CFR part 121 and size standards in this solicitation.
- (2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern," consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that

- (1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-
 - (i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States, and
 - (ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and
- (2) The management and daily business operations of which are controlled (as defined at 13 CFR 124.106) by individuals who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Veteran-owned small business concern" means a small business concern-

- (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business concern" means a small business concern-

- (1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127), means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States.

(b)

- (1) The North American Industry Classification System (NAICS) code for this acquisition is See Note.*
- (2) The small business size standard is See Note.



(3) TAB SINGIP STINE SLIZE 4 LAR CATH for DOGILEM FWHICH SIGMILES FIND THE DIA/12-4/25 name, agree 28 and oa 64 construction or service contract, but which proposes to furnish a product which it did not itself manufacture, is 500 employees.

(c) Representations

If no NAICS table is displayed, this registrant may not be considered a small business.

(1) ** The offeror represents as part of its offer that it, SIS NOT a small business concern (see below). (2) ** [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, that it □ is, □ is not, a small disadvantaged business concern as defined in 13 CFR 124.1002. (3) ** [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a women-owned small business concern. (See Below) (4) ** Women-owned small business (WOSB) concern eligible under the WOSB Program. [Complete only if the offeror represented itself as a women-owned small business concern in paragraph (c)(3) of this provision.] The offeror represents as part of its offer that-(i) It ☐ is, ☐ is not a WOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It □ is, □ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(4)(i) of this provision is accurate for each WOSB concern eligible under the WOSB Program participating in the joint venture. [The offeror shall enter the name or names of the WOSB concern eligible under the WOSB Program and other small businesses that are participating in the joint venture: .] Each WOSB concern participating in the joint venture shall submit a separate signed copy of the WOSB representation. (5) ** Economically disadvantaged women-owned small business (EDWOSB) concern. [Complete only if the offeror represented itself as a women-owned small business concern eligible under the WOSB Program in (c)(4) of this provision.] The offeror represents as part of its offer that-(i) It ☐ is, ☐ is not an EDWOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(5)(i) of this provision is accurate for each EDWOSB concern participating in the joint venture. [The offeror shall enter the name or names of the EDWOSB concern and other small businesses that are participating in the joint venture: .] Each EDWOSB concern participating in the joint venture shall submit a separate signed copy of the EDWOSB representation. (6) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a veteran-owned small business concern. (7) **[Complete only if the offeror represented itself as a veteran-owned small business concern in paragraph (c)(6) of this provision.] The offeror represents as part of its offer that it \square is, \square is not a service-disabled veteran-owned small business concern. (See Below) *If you are responding to a Government solicitation for supplies or services under a NAICS code not listed in paragraph (b) of this certification, you must provide this certification directly to the Contracting Officer.

**Smartb &: Abs Scond lab fee Ahlown Doch Min Business Concern Fise Abi Quadrate business concern, and Women-owned small business concern size status is call Business Administration size standard for each NAICS code using the size metric Employees and Average Annual Receipts) provided by FLORIDA STATE UNIVERSITY.	culated based on the Small cs (e.g. Average Number of
(8) [Complete only if the offeror represented itself as a small business concern provision.] The offeror represents, as part of its offer, that-	in paragraph (c)(1) of this
(i) It ☐ is, ☐ is not a HUBZone small business concern listed, on the date of List of Qualified HUBZone Small Business Concerns maintained by the Sma and no material changes in ownership and control, principal office, or HUBZ have occurred since it was certified in accordance with 13 CFR Part 126; and	ll Business Administration, Zone employee percentage
(ii) It ☐ is, ☐ is not a HUBZone joint venture that complies with the requirer and the representation in paragraph (c)(8)(i) of this provision is accurate for business concern participating in the HUBZone joint venture. [The offeror s each of the HUBZone small business concerns participating in the HUBZone HUBZone small business concern participating in the joint venture shall subcopy of the HUBZone representation.	each HUBZone small hall enter the names of e joint venture:] Each
(d) Notice.	
(1) If this solicitation is for supplies and has been set aside, in whole or in part, then the clause in this solicitation providing notice of the set-aside contains resend items to be furnished.	
(2) Under 15 U.S.C. 645(d), any person who misrepresents a firm's status as a beta HUBZone small, small disadvantaged, service-disabled veteran-owned small, of woman-owned small, or women-owned small eligible under the WOSB Program to be awarded under the preference programs established pursuant to section Small Business Act or any other provision of Federal law that specifically refere definition of program eligibility, shall-	economically disadvantaged n in order to obtain a contract 8, 9, or 15, 31, and 36 of the
(i) Be punished by imposition of fine, imprisonment, or both;	
(ii) Be subject to administrative remedies, including suspension and debarn	nent; and
(iii) Be ineligible for participation in programs conducted under the authori	ty of the Act.
Alternate I (Sept 2015)	
As prescribed in 19.309(a)(2), add the following paragraph (c)(9) to the basic provis	sion:
 (9) [Complete if offeror represented itself as disadvantaged in paragraph (c)(2) shall check the category in which its ownership falls: ☐ Black American. ☐ Hispanic American. 	of this provision.] The offeror
 □ Native American (American Indians, Eskimos, Aleuts, or Native Hawaiians). □ Asian-Pacific American (persons with origins from Burma, Thailand, Malaysia Brunei, Japan, China, Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Coumariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu □ Subcontinent Asian (Asian-Indian) American (persons with origins from India Lanka, Bhutan, the Maldives Islands, or Nepal). □ Individual/concern, other than one of the preceding. 	The Philippines, Republic of mmonwealth of the Northern , or Nauru).
- marriada y concern, other than one of the preceding.	ED 003269

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FAR 52.219-2 Equal Low Bids (Oct 1995)

- (a) This provision applies to small business concerns only
- (b) The bidder's status as a labor surplus area (LSA) concern may affect entitlement to award in case of tie bids. If the bidder wishes to be considered for this priority, the bidder must identify, in the following space, the LSA in which the costs to be incurred on account of manufacturing or production (by the bidder or the first-tier subcontractors) amount to more than 50 percent of the contract price.
- (c) Failure to identify the labor surplus areas as specified in paragraph (b) of this provision will preclude the bidder from receiving priority consideration. If the bidder is awarded a contract as a result of receiving priority consideration under this provision and would not have otherwise received award, the bidder shall perform the contract or cause the contract to be performed in accordance with the obligations of an LSA concern.

(End of Provision)

FAR 52.222-18 Certification Regarding Knowledge of Child Labor for Listed End Products (Feb 202	21)
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(a) Definition:

"Forced or indentured child labor" means all work or service-

- (1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or
- (2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.
- (b) Listed end products. The following end product(s) being acquired under this solicitation is (are) included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, identified by their country of origin. There is a reasonable basis to believe that listed end products from the listed countries of origin may have been mined, produced, or manufactured by forced or indentured child labor.

Listed End Products	Listed Country of Origin	
Bamboo	Burma	
Beans (green, soy, yellow)	Burma	
Brazil Nuts/Chestnuts	Bolivia	
Bricks	Afghanistan, Burma, China, India, Nepal, Pakistan	
Carpets	Nepal, Pakistan	
Cattle	South Sudan	
Cassiterite	Democratic Republic of Congo	
Coal	Pakistan	
Coca (stimulant plant)	Colombia	
Cocoa	Cote d'Ivoire, Nigeria	
Coffee	Cote d'Ivoire	
Coltan	Democratic Republic of Congo	
Cotton	Benin, Burkina Faso, China, Tajikistan, Uzbekistan	
Cottonseed (hybrid)	India	
Diamonds	Sierra Leone	
Dried Fish	Bangladesh	ED 003270

Case 8:25 End products BAH	Document 46-23 Listled Colon 24 Page 101 of 364
Electronics	China
Embroidered Textiles (zari)	India, Nepal
Fish	Ghana
Garments	Argentina, India, Thailand, Vietnam
Gold	Burkina Faso, Democratic Republic of Congo
Granite	Nigeria
Gravel (crushed stones)	Nigeria
Pornography	Russia
Rice	Burma, India, Mali
Rubber	Burma
Shrimp	Thailand
Stones	India, Nepal
Sugarcane	Bolivia, Burma
Teak	Burma
Textiles (hand-woven)	Ethopia
Tilapia (fish)	Ghana
Tobacco	Malawi
Toys	China
Wolframite	Democratic Republic of Congo

- (c) Certification. The Government will not make award to an offeror unless the offeror, by checking the appropriate block, certifies to either paragraph (c)(1) or paragraph (c)(2) of this provision
 - (1) The offeror will not supply any end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in a corresponding country as listed for that end product.
 - (2) The offeror may supply an end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product. The offeror certifies that it has made a good faith effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture such end product. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

FAR 52.222-22 Previous Contracts and Compliance Reports (Feb 1999)

The offeror represents that-

- (a) It **HAS** participated in a previous contract or subcontract subject the Equal Opportunity clause of this solicitation;
- (b) It **HAS** filed all required compliance reports; and
- (c) Representations indicating submission of required compliance reports, signed by proposed subcontractors, will be obtained before subcontract awards.

(End of Provision)

FAR 52.222-25 Affirmative Action Compliance (Apr 1984)



- (a) It HAS DEVELOPED AND HAS ON FILE, at each establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor (41 CFR 60-1 and 60-2); or
- (b) It \square has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

	Exemption from Application of the Service Contract Labor	
FAR 52.222-48	Standards to Contracts for Maintenance, Calibration, or Repair of	(May 2014)
	Certain Equipment-Certification	

(a) The offeror shall check the following certification: Certification

The offeror **ODES NOT CERTIFY** that -

- (1) The items of equipment to be serviced under this contract are used regularly for other than Government purposes, and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontractor) in substantial quantities to the general public in the course of normal business operations;
- (2) The services will be furnished at prices which are, or are based on, established catalog or market prices for the maintenance, calibration, or repair of equipment.
 - (i) An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public.
 - (ii) An "established market price" is a current price, established in the usual course of trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror; and
- (3) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract are the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.
- (b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(c)(3) that the Service Contract Labor Standards statute-
 - (1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or
 - (2) Will apply to this offeror, then the clause at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, in this solicitation will not be included in any resultant contract awarded to this offeror, and the offeror may be provided an opportunity to submit a new offer on that basis.
- (c) If the offeror does not certify to the conditions in paragraph (a) of this provision-
 - (1) The clause in this solicitation at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, will not be included in any resultant contract awarded to this offeror; and
 - (2) The offeror shall notify the Contracting Officer as soon as possible, if the Contracting Officer biology 272

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(d) The Contracting Officer may not make an award to the offeror, if the offeror fails to execute the certification in paragraph (a) of this provision or to contact the Contracting Officer as required in paragraph (c) of this provision.

(End of Provision)

FAR 52.222-52

Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Certification

(May 2014)

(a) The offeror shall check the following certification:

Certification

The offeror **② DOES NOT** certify that -

- (1) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;
- (2) The contract services are furnished at prices that are, or are based on, established catalog or market prices. An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public. An "established market price" is a current price, established in the usual course of ordinary and usual trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror;
- (3) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and
- (4) The offeror uses the same compensation (wage and fringe benefits) plan for all service employees performing work under the contract as the offeror uses for these employees and for equivalent employees servicing commercial customers.
- (b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(d)(3) that the Service Contract Labor Standards statute-
 - (1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or
 - (2) Will apply to this offeror, then the clause at FAR 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, in this solicitation will not be included in any resultant contract awarded to this offer, and the offeror may be provided an opportunity to submit a new offer on that basis.
- (c) If the offeror does not certify to the conditions in paragraph (a) of this provision-
 - (1) The clause of this solicitation at 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, will not be included in any resultant contract to this offeror; and
 - (2) The offeror shall notify the Contracting Officer as soon as possible if the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation.

(d) The Contracting Office as required in paragraph (c) of this provision.



(End of Provision)

FAR 52.223-4 Recovered Material Certification (May 2008)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.223-9 Estimate of Percentage of Recovered Material Content for EPA
(May 2008)

Designated Items (Alternate I)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.223-22 Public Disclosure of Greenhouse Gas Emissions and Reduction
Goals-Representation (Dec 2016)

As prescribed in 23.804(b), insert the following provision:

Public Disclosure of Greenhouse Gas Emissions and Reduction Goals- Representation (Dec 2016)

- (a) This representation shall be completed if the Offeror received \$7.5 million or more in Federal contract awards in the prior Federal fiscal year. The representation is optional if the Offeror received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.
- (b) Representation [Offeror is to check applicable blocks in paragraphs (b)(1) and (2).]
 - (1) The Offeror (itself or through its immediate owner or highest-level owner) **DOES**, publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.
 - (2) The Offeror (itself or through its immedaite owner or highest-level owner), DOES NOT publicly disclose a quantitative greenhouse emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.
 - (3) A publicly accessible Web site includes the Offeror's own Web site or a recognized, third-party greenhouse gas emissions reporting program.
- (c) If the Offeror checked "does" in paragraphs (b)(1) or (b)(2) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported: https://ghgdata.epa.gov/ghgp/service/facilityDetail/2021?id=1005785&ds=E&et=&popup=true (blank)

(End of Provision)

FAR 52.225-2 Buy American Certificate (Feb 2021)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

ED 003274 (Feb 2021)



FAR 52.225-6 Trade Agreements Certificate (Feb 2021)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.226-2	Historically Black College or University and Minority Institution	(Oct 2014)
	Representation	(000 2014)

(a) Definitions. As used in this provision-

"Historically black college or university" means an institution determined by the Secretary of Education to meet the requirements of 34 CFR 608.2.

"Minority institution" means an institution of higher education meeting the requirements of Section 365(3) of the Higher Education Act of 1965 (20 U.S.C. 1067k), including a Hispanic-serving institution of higher education, as defined in Section 502(a) of the Act (20 U.S.C. 1101a).

- (b) Representation. The offeror represents that it-
- **℧ IS NOT** a historically black college or university;
- **S** IS **NOT** a minority institution.

(End of Provision)

FAR 52.227-15	Representation of Limited Rights Data and Restricted Computer	(Dec 2007)
	Software	(Dec 2001)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)



UNITED STATES DEPARTMENT OF EDUCATION

OFFICE OF FINANCE AND OPERATIONS

OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

MEMORANDUM TO THE FILE

Date: December 6, 2022

To: File

From: Ashley Blaze, Contract Specialist Contract Number: 91990022C0014 - REL Southeast

Subject: Incremental Funding and Other Miscellaneous Changes

Contractor: Florida State University

Exercised Amount: \$6,323,006.83

Modification Number: P00002

Background

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

Authority

Modification P00002 is executed in accordance with the following contract clauses: Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

Purpose

The purpose of this modification is to:

- 1. Provide incremental funding in the amount of \$6,323,006.83 via Purchase Order EDOIES-23-000056.
- 2. Revise the Schedule of Deliverables, dated October 31, 2022.
- 3. Revise the Performance Work Statement (PWS), dated November 3, 2022.
- 4. Revise the obligated amount of this contract from \$5,228,196.15 by \$6,323,006.83 to \$11,551,202.98.

400 MARYLAND AVE., S.W., WASHINGTON, DC 20202

Funding

The total cost of this action is \$6,323,006.83 via Purchase Requisition Number EDOIES-23-000057.

Period of Performance

This modification does not affect the period of performance. The period of performance remains January 3, 2022, through January 2, 2027.

Synopsis

There is no requirement for synopsizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

Scope of Work

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

Recommendation

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00002. It is therefore recommended that incremental funding be added, revised Schedule of Deliverables, and revised PWS be adopted into Contract Number 91990022C0014.



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AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT			1. CONTRACT ID CODE		PAGE OF	PAGES
		_			1	5
2. AMENDMENT/MODIFICATION NUMBER	3. EFFECTIVE DATE	4. REQUISITION/PURCHA	SE REQUISITION NUMBER	5. PROJECT NU	MBER (If applic	:able)
91990022C0014P00002	DEC 12, 2022					
6. ISSUED BY CODE US Dept of ED-550 12th Street SW - Room 7169 Washington DC 20065	CAMPCP	7. ADMINISTERED BY (See Block 6	(If other than Item 6)	CODE		
8. NAME AND ADDRESS OF CONTRACTOR (Number, street FLORIDA STATE UNIVERSITY 874 TRADITIONS WAY TALLAHASSEE FL 32306	UEI: JF2 DUNS: (] e) BLNN4PJC3 00027876 ode: 3S772	9A. AMENDMENT 9B. DATED (SEE 10A. MODIFICATI	ITEM 11)	CT/ORDER NU	MBER
			X 10B. DATED (SEE	E ITEM 13)		
CODE 00027876 FA	CILITY CODE	JAN 24, 2022				
11. THIS	ITEM ONLY APPLIES T	O AMENDMENTS OF	SOLICITATIONS			
The above numbered solicitation is amended as set forth Offers must acknowledge receipt of this amendment prior to the (a) By completing items 8 and 15, and returning or (c) By separate letter or electronic communication which incl RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIF by virtue of this amendment you desire to change an offer alrea communication makes reference to the solicitation and this amendment you desire to change and offer alrea communication makes reference to the solicitation and this amendment you desire to change and offer alrea communication makes reference to the solicitation and this amendment you desire to change and offer alrea communication makes reference to the solicitation and this amendment you desire to change an offer alrea communication makes reference to the solicitation and this amendment you desire to change an offer alrea communication makes reference to the solicitation and this amendment you desire to change an offer alrea communication which includes the properties of the solicitation and this amendment you desire to change an offer alrea communication makes reference to the solicitation and this amendment you desire to change an offer alrea communication makes reference to the solicitation and this amendment you desire to change an offer alrea communication which includes the properties of the solicitation which includes the propert	e hour and date specified in t copies of the amendment; udes a reference to the solic PT OF OFFERS PRIOR TO T ady submitted, such change rendment, and is received prior	he solicitation or as amend (b) By acknowledging rec itation and amendment nui THE HOUR AND DATE SP may be made by letter or e or to the opening hour and	ded, by one of the following eipt of this amendment on mbers. FAILURE OF YOU ECIFIED MAY RESULT IN electronic communication, particular specified. Modification CONTRACT/ORDER	each copy of the R ACKNOWLEDON REJECTION OF provided each letter Modification Arn Obligated Arn NUMBER AS D	offer submitted; GMENT TO BE TYOUR OFFER er or electronic mount: \$6,32 mount: \$6,32	23,006.83 23,006.83 N ITEM 14.
B. THE ABOVE NUMBERED CONTRACT/OR data, etc.) SET FORTH IN ITEM 14, PURSI C. THIS SUPPLEMENTAL AGREEMENT IS E FA R 52.243-2 Alternate I; FAR 43	JANT TO THE AUTHORITY NTERED INTO PURSUANT	OF FAR 43.103(b).	IVE CHANGES (such as o	changes in paying	office, appropria	ation
D. OTHER (Specify type of modification and at						
E. IMPORTANT: Contractor is not x is	required to sign this do	ocument and return	1 copies	to the issuing	office.	
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organ) See attached. Except as provided herein, all terms and conditions of the document of the second of the se	nized by UCF section heading	gs, including solicitation/co.	ged, remains unchanged a	e feasible.) and in full force an	d effect.	
15B. CONTRACTOR/OFFEROR Rose Driber for Stacey Patterson, VP for Research for Research Date: 2022.12.09 09:28:23 -05	12/9/2022	JOSEPH GI	ES OF AMERICA Digitally signed by Journal Date: 2022.12.13 12::	DSEPH GIBBS 50:00 -05'00'	16C. DATE SIG	
(Signature of person authorized to sign)	(Signatu	re of Contracting Officer)				

Previous edition unusable

STANDARD FORM 30 (REV. 11/2016) Prescribed by GSA FAR (48 CFR) 53.243 The purpose of this modification is to:

- 1. Provide incremental funding in the amount of \$6,323,006.83 via Purchase Order EDOIES-23-000056.
- 2. Revise the Schedule of Deliverables, dated October 31, 2022.
- 3. Revise the Performance Work Statement (PWS), dated November 3, 2022.
- 4. Revise the obligated amount of this contract from \$5,228,196.15 by \$6,323,006.83 to \$11,551,202.98.

Contract or Statement of Release

In consideration of the modification agreed to herein as complete equitable adjustments, the Contractor hereby releases the Government from any and all liability for any further equitable adjustment attributable to such facts or circumstances giving rise to this change.

	SCHEDULE C		06/24/2	Dogo 110 of	264
ITEM NO.	Case 8:25-cv-01154-BAH Document 46-2 SUPPLIES/SERVICES	QUANTITY	UNIT	5 Page 110 of	304 AMOUNT
	Contracting Officer: Joseph Gibbs, 202-245-6016, Joseph.Gibbs@ed.gov				
	Primary Contracting Officer Representative: Janelle Sands, 202-245-6786, janelle.sands@ed.gov				
	Alternate Contracting Officer Representative(s): Christopher Boccanfuso, chris.boccanfuso@ed.gov				
	Primary Technical Point of Contact: Janelle Sands, 202-245-6786, janelle.sands@ed.gov				
	Alternate Technical Point(s) of Contact: None				
	(New Line Item) Regional Educational Laboratories (REL) Southeast				
0002AA	Year 2 CPFF (non-travel)	1.00	SE	6,128,006.83	6,128,006.83
	Accounting and Appropriation Data: 1100M2022.B.2023.ER000000.RL2.2550A.000.117. 0000.000000 \$6,128,006.83 Period of Performance: 01/03/2022 to 01/02/2027				
	(New Line Item)				
0002AB	REL Southeast Year 2 Travel	1.00	SE	195,000.00	195,000.00
	Accounting and Appropriation Data: 1100M2022.B.2023.ER000000.RL2.2550A.000.117. 0000.000000 \$195,000.00 Period of Performance: 01/03/2022 to 01/02/2027				

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J.1	309-1aLIST OF ATTACH	MENTS			5

Case 8:25-cv-01154-BAH Document 46-23 Filed 06/24/25 Page 112 of 364 LIST OF ATTACHMENTS

J.1 309-1a LIST OF ATTACHMENTS
 Attachment 1 - Performance of Work Statement
Attachment 2 - Deliverable Schedule

					SCHEDULE OF DELIVERABLES		
	Deli	Deliverable#	le #	Deliverable Name		Draft Date Due	Submitted
TASK	1 -	REL I	Managem	Management & Reporting			
1 .	1			Summary of REL Kickoff Meeting	Meeting		
1	1	1		Summary of REL Kickoff Meeting	Meeting	NA	NA
1	2	1		Bimonthly call agendas			
1	2	1	1	Year 1 February Call 1	Agenda	2/7/22	2/7/2022
1	2	1	2	Year 1 February Call 2	Agenda	2/21/22	2/18/2022
1	2	1	3	Year 1 March Call 1	Agenda	3/7/22	3/4/2022
1	2	1	4	Year 1 March Call 2	Agenda	3/21/22	3/21/2022
1 .	2	1	5	Year 1 April Call 1	Agenda	4/4/22	4/4/2022
1 .	2	1	9	Year 1 April Call 2	Agenda	4/18/22	4/18/2022
1 .	2	1	7	Year 1 May Call 1	Agenda	5/2/22	5/2/2022
1	2	1	8	Year 1 May Call 2	Agenda	5/16/22	5/13/2022
1 .	2	1	6	Year 1 June Call 1	Agenda	6/6/22	6/6/2022
1	2	1	10	Year 1 June Call 2	Agenda	6/20/22	6/17/2022
1 .	2	1	11	Year 1 July Call 1	Agenda	7/11/22	7/8/2022
1	2	1	12	Year 1 July Call 2	Agenda	7/25/22	7/22/2022
1	2	1	13	Year 1 August Call 1	Agenda	8/8/22	8/8/2022
1 .	2	1	14	Year 1 August Call 2	Agenda	8/22/22	8/19/2022
1	2	1	15	Year 1 September Call 1	Agenda	9/2/22	9/2/2022
1	2	1	16	Year 1 September Call 2	Agenda	9/19/22	
1	2	1	17	Year 1 October Call 1	Agenda	10/3/22	10/3/2022
1	2	1	18	Year 1 October Call 2	Agenda	10/17/22	10/16/2022
1	2	1	19	Year 1 November Call 1	Agenda	10/31/22	
1	2	1	20	Year 1 November Call 2	Agenda	11/14/22	
1 .	2	1	21	Year 1 December Call 1	Agenda	12/5/22	
1 .	2	1	22	Year 1 December Call 2	Agenda	12/19/22	
1 .	2	1	23	Year 2 January Call 1	Agenda	1/9/23	
1	2	1	24	Year 2 January Call 2	Agenda	1/23/23	
1	2	1	25	Year 2 February Call 1	Agenda	2/6/23	
1	2	<u>-</u>	26	Year 2 February Call 2	Agenda	2/20/23	
1	2	1	27	Year 2 March Call 1	Agenda	3/6/23	

2 1 28 Year 2 April Call 1 Agenda 2 1 29 Year 2 April Call 1 Agenda 2 1 30 Year 2 April Call 2 Agenda 2 1 33 Year 2 May Call 2 Agenda 2 1 33 Year 2 June Call 1 Agenda 2 1 33 Year 2 June Call 1 Agenda 2 1 34 Year 2 June Call 1 Agenda 2 1 34 Year 2 June Call 1 Agenda 2 1 34 Year 2 June Call 1 Agenda 2 1 35 Year 2 June Call 1 Agenda 2 1 35 Year 2 June Call 2 Agenda 2 1 36 Year 2 June Call 3 Agenda 2 1 37 Year 2 June Call 3 Agenda 3 Year 2 September Call 1 Agenda 4 Year 2 September Call 1 Agenda 5 1 44 Year 2 December Call 1 Agenda 6 Year 1 February Call 2 Agenda 7	3/20/23	4/3/23	4/17/23	5/1/23	5/15/23	6/5/23	6/19/23	7/10/23	7/24/23	8/7/23	8/21/23	9/4/23	9/18/23	10/2/23	10/16/23	10/30/32	11/13/23	12/4/23	12/18/23		2/16/22 2/11/2022	3/2/22 2/28/2022	3/16/22 3/15/2022	3/30/22 3/25/2022	4/13/22 4/11/2022	4/27/22 4/27/2022	5/11/22 5/6/2022	5/25/22 5/23/2022	6/15/22 6/14/2022	6/29/22 6/24/2022	7/20/22 7/20/2022	8/3/22 8/1/2022	8/17/22 8/17/2022	
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 1 . 28 Year 2 Marcl 1 . 29 Year 2 April 1 . 30 Year 2 April 1 . 31 Year 2 May 6 1 . 32 Year 2 June 6 1 . 33 Year 2 June 6 1 . 34 Year 2 July 6 1 . 34 Year 2 July 7 1 . 35 Year 2 July 6 1 . 35 Year 2 July 7 1 . 36 Year 2 Septe 1 . 40 Year 2 Septe 1 . 41 Year 2 Decent 1 . 42 Year 2 Decent 1 . 45 Year 2 Decent 1 . 46 Year 2 Decent 1 . 46 Year 1 Harcl 2 . 2 . 1 Year 1 Hardl 2 . 3 Year 1 Hay 6 2 . 4 Year 1 April 2 . 5 Year 1 April 2 . 6 Year 1 April 2 . 6 Year 1 June 6 2 . 7 Year 1 June 6 2 . 10 Year 1 July 6 2 . 10 Year 1 July 6 2 . 10 Year 1 July 6 2 . 12 Year 1 July 6 2 . 13 Year 1 Augu 	Agenda	Agenda	Agenda	Agenda	Agenda	Agenda	Agenda	Agenda	Agenda	Agenda	Agenda				Agenda	1 Agenda				80														
	Year 2 March Call 2	April	Year 2 April Call 2		Year 2 May Call 2		Year 2 June Call 2	Year 2 July Call 1		Year 2 August Call 1	Year 2 August Call 2	Year 2 September Call	Year 2 September Call	Year 2 October Call 1	Year 2 October Call 2	Year 2 November Call	Year 2 November Call	Year 2 December Call	Year 2 December Call 3		Year 1 February Call 1	Year 1 February Call 2	Year 1 March Call 1	Year 1 March Call 2		April		Year 1 May Call 2	Year 1 June Call 1	Year 1 June Call 2	Year 1 July Call 1	Year 1 July Call 2	Year 1 August Call 1)
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1 .	2	2	. 15	Year 1 September Call 1	9/14/22	9/12/2022
1	2	\vdash	. 16		9/28/22	
1	2	2	. 17	Year 1 October Call 1	10/12/22	10/5/2022
1	2	2	. 18	Year 1 October Call 2	10/26/22	10/21/2022
1	2	2	. 19	Year 1 November Call 1	11/9/22	
1	2	2	. 20	Year 1 November Call 2	11/23/22	
1	2	2	. 21	Year 1 December Call 1	12/14/22	
1	2	2	. 22	Year 1 December Call 2	12/23/22	
1		2	. 23	Year 2 January Call 1	1/18/23	
1	2	2	. 24	Year 2 January Call 2	2/1/23	
1	2	2	. 25	Year 2 February Call 1	2/15/23	
1	2	2	. 26	Year 2 February Call 2	3/1/23	
1	2	2	. 27	Year 2 March Call 1	3/15/23	
1	2	2	. 28	Year 2 March Call 2	3/29/23	
1	2	2	. 29	Year 2 April Call 1	4/12/23	
1	2	2	. 30	Year 2 April Call 2	4/26/23	
1	2	2	. 31	Year 2 May Call 1	5/10/23	
1	2	2	. 32	Year 2 May Call 2	5/24/23	
1 .	2	2	. 33	Year 2 June Call 1	6/14/23	
1	2	2	. 34	Year 2 June Call 2	6/28/23	
1	2	2	35	Year 2 July Call 1	7/19/23	
1	2	2	36	Year 2 July Call 2	8/2/23	
1	2	2	37	Year 2 August Call 1	8/16/23	
1	2	2	38	Year 2 August Call 2	8/30/23	
1	2	2	39	Year 2 September Call 1	9/13/23	
1	2	2	40	Year 2 September Call 2	9/27/23	
1	2	2	41	Year 2 October Call 1	10/11/23	
1	2	2	42	Year 2 October Call 2	10/25/23	
1	2	2	43	Year 2 November Call 1	11/8/23	
1	2	2	44	Year 2 November Call 2	11/22/23	
1	2	2	45	Year 2 December Call 1	12/13/23	
1	2	2	46	Year 2 December Call 2	12/22/23	
1	4			Department presentation briefing materials		

<u></u>	4			Department presentation briefing materials - Year 2 first meeting	materials - Year 2 first meeting	3 weeks before each meeting	
	4			Summary of department presentat	department presentation - Year 2 first meeting	3 weeks before each meeting	
	4		· .	Summary of department presentat	department presentation - Year 2 second meeting	3 weeks before each meeting	
	4		4	Summary of department presentat	department presentation - Year 2 second meeting	1 week after each meeting	
1	S			Identify, establish, maintain and convene the	and convene the Governing Board		
1	5	. 1		Report of the Establishment of the Governing Board	e Governing Board	5 weeks after award	2/24/2022
1	5	. 2		Agenda and materials for Governi Board meeting	Agenda and materials for Governing Board meeting - Year 1 Spring Governing Board meeting	2/11/22	2/11/2022
1	5	. 3	. 1	Meeting minutes and action items	Meeting minutes and action items - Year 1 Spring Governing Board meeting	3/21/22	3/21/2022
<u>.</u>	v,	. 2		Agenda and materials for Governi Board meeting	Agenda and materials for Governing Board meeting - Year 1 Fall Governing Board meeting	3 weeks before meeting	9/16/2022
<u> </u>	ς.		. 2	Meeting minutes and action items	Meeting minutes and action items - Year 1 Fall Governing Board meeting	10/24/22	10/21/2022
<u> </u>	v	. 2	· .	Agenda and materials for Governi Board meeting	Agenda and materials for Governing Board meeting - Year 2 Spring Governing Board meeting	3 weeks before meeting	
1	5	. 3	. 3	Meeting minutes and action items	Meeting minutes and action items - Year 2 Spring Governing Board meeting	2 weeks after meeting	
1 .	5	. 2	4	Agenda and materials for Governi Board meeting	Agenda and materials for Governing Board meeting - Year 2 Fall Governing Board meeting	3 weeks before meeting	
1	5	. 3	4	Meeting minutes and action items	utes and action items - Year 2 Fall Governing Board meeting	2 weeks after meeting	
1	9			Bi-Annual Assessment of Progress Report	gress Report		
1	9	1		Memo: Bi-Annual Assessment of Progress	Progress	4/15/22	5/2/2022
<u>.</u>	9	1	. 2	Bi-Annual Assessment of Progress Report	s Report	12/1/22	
1	9		. 3	Bi-Annual Assessment of Progress Report	s Report	6/1/23	

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1 . 6 . 1 . 4	Bi-Annual Assessment of Progress Report	t of Progress Report	12/1/23	
1 . 7	Monthly Progress Report	Report		
1 . 7 . 1 . 1	Year 1 February	Monthly Progress Report	3/15/22	3/11/2022
1 7 1 2	Year 1 March	Monthly Progress Report	4/15/22	4/15/2022
1 7 1 3	Year 1 April	Monthly Progress Report	5/16/22	5/13/2022
1 . 7 . 1 . 4	Year 1 May	Monthly Progress Report	6/15/22	6/15/2022
1 7 1 5	Year 1 June	Monthly Progress Report	7/18/22	7/18/2022
1 7 . 1 . 6	Year 1 July	Monthly Progress Report	8/15/22	8/11/2022
1 . 7 . 1 . 7	Year 1 August	Monthly Progress Report	9/16/22	9/16/2022
1 . 7 . 1 . 8	Year 1 September	Monthly Progress Report	10/17/22	10/17/2022
1 7 1 9	Year 1 October	Monthly Progress Report	11/15/22	
1 . 7 . 1 . 10	Year 1 November	Monthly Progress Report	12/15/22	
1 . 7 . 1 . 11	Year 1 December	Monthly Progress Report	1/6/23	
1 7 1 12	Year 2 January	Monthly Progress Report	2/15/23	
1 . 7 . 1 . 13	Year 2 February	Monthly Progress Report	3/15/23	
1 . 7 . 1 . 14	Year 2 March	Monthly Progress Report	4/17/23	
1 . 7 . 1 . 15	Year 2 April	Monthly Progress Report	5/15/23	
1 . 7 . 1 . 16	Year 2 May	Monthly Progress Report	6/15/23	
1 . 7 . 1 . 17	Year 2 June	Monthly Progress Report	7/18/23	
1 . 7 . 1 . 17	Year 2 July	Monthly Progress Report	8/15/23	
1 . 7 . 1 . 17	Year 2 August	Monthly Progress Report	9/15/23	
1 . 7 . 1 . 17	Year 2 September	Monthly Progress Report	10/16/23	
1 . 7 . 1 . 17	Year 2 October	Monthly Progress Report	11/15/23	
1 . 7 . 1 . 17	Year 2 November	Monthly Progress Report	12/15/23	
1 . 7 . 1 . 17	Year 2 December	Monthly Progress Report	1/17/24	
1 . 8	Performance reporting	ting		
1 . 8 . 1 . 1	Performance report 1		Upon request	
1 . 8 . 1 . 2	Performance report 2		Upon request	
1 8 . 1 . 3	Performance report 3		Upon request	
1 . 8 . 1 . 4	Performance report 4		Upon request	
1 . 8 . 1 . 5	Performance report 5		Upon request	
1 . 8 . 1 . 6	Performance report 6		Upon request	
1 8 . 1 . 7	Performance report 7		Upon request	

							Submission of security documents for low and moderate level		
1	6								
1	6		<u> </u>	—			Submission of security documents for low and moderate level clearances	As needed	
1	10						REL evaluation materials		
1	10			1			REL evaluation materials	TBD	
TASK	7	- Co	ord	Coordination	tion	1 &	Collaboration		
2	1						Lead cross-REL coordination activities		
2 .			<u> </u>	1		а	Foundational Literacy Cross-REL working group agenda #1	2 weeks before meeting	5/6/2022
2	-			-	·	а	Foundational Literacy Cross-REL working group memo #1	2 weeks after meeting	5/23/2022
2				2	·	а	Foundational Literacy Cross-REL working group agenda #2	2 weeks before meeting	8/10/2022
2				2	·	а	Foundational Literacy Cross-REL working group memo #2	2 weeks after meeting	8/26/2022
2			-	3	·	В	Foundational Literacy Cross-REL working group agenda #3	2 weeks before meeting	10/16/2022
2		. 2		3	٠	а	Foundational Literacy Cross-REL working group memo #3	2 weeks after meeting	
2				4	·	a	Foundational Literacy Cross-REL working group agenda #4	2 weeks before meeting	
2	-			4	·	а	Foundational Literacy Cross-REL working group memo #4	2 weeks after meeting	
2				5		а	Foundational Literacy Cross-REL working group agenda #5	2 weeks before meeting	
2	1			5	·	а	Foundational Literacy Cross-REL working group memo #5	2 weeks after meeting	
2	1			9	·	а	Foundational Literacy Cross-REL working group agenda #6	2 weeks before meeting	

	•	7	<u>. </u>		a	Foundational Literacy Cross-REL working group memo #6	2 weeks after meeting	
	•	-			a	Foundational Literacy Cross-REL working group agenda #7	2 weeks before meeting	
		2			B	Foundational Literacy Cross-REL working group memo #7	2 weeks after meeting	
		-	•	∞ .		Foundational Literacy Cross-REL working group agenda #8	2 weeks before meeting	
	•	2		~	B	Foundational Literacy Cross-REL working group memo #8	2 weeks after meeting	
				1		Toolkit Development Cross-REL working group agenda #1	2 weeks before meeting	5/5/2022
	•	2			. р	Toolkit Development Cross-REL working group memo #1	2 weeks after meeting	5/11/2022
	•		. 2		- P	Toolkit Development Cross-REL working group agenda #2	2 weeks before meeting	5/31/2022
. 1	٠	2	. 2		. b	Toolkit Development Cross-REL working group memo #2	2 weeks after meeting	6/16/2022
1			. 3			Toolkit Development Cross-REL working group agenda #3	2 weeks before meeting	7/18/2022
1	٠	2		3	. р	Toolkit Development Cross-REL working group memo #3	2 weeks after meeting	7/27/2022
1	•	1	4		. b	Toolkit Development Cross-REL working group agenda #4	2 weeks before meeting	8/9/2022
1		2	. 4		. b	Toolkit Development Cross-REL working group memo #4	2 weeks after meeting	8/24/2022
1	•	1	•		. b	Toolkit Development Cross-REL working group agenda #5	2 weeks before meeting	9/2/2022

7	-	•	7		5	•	b	Toolkit Development Cross-REL working group memo #5	2 weeks after meeting	9/28/2022
2	•		-		9		р	Toolkit Development Cross-REL working group agenda #6	2 weeks before meeting	10/16/2022
7			7		9		þ	Toolkit Development Cross-REL working group memo #6	2 weeks after meeting	10/26/2022
2			1		7	•	þ	Toolkit Development Cross-REL working group agenda #7	2 weeks before meeting	
2			7		7		þ	Toolkit Development Cross-REL working group memo #7	2 weeks after meeting	
2			1		∞	•	þ	Toolkit Development Cross-REL working group agenda #8	2 weeks before meeting	
7		•	7		∞	•	þ	Toolkit Development Cross-REL working group memo #8	2 weeks after meeting	
2	. 1	•	1		6	•	b	Toolkit Development Cross-REL working group agenda #9	2 weeks before meeting	
2		•	2		6	•	þ	Toolkit Development Cross-REL working group memo #9	2 weeks after meeting	
2		•	1	•	10	•	b	Toolkit Development Cross-REL working group agenda #10	2 weeks before meeting	
2			2	•	10	•	þ	Toolkit Development Cross-REL working group memo #10	2 weeks after meeting	
2		•	1	•	11	•	þ	Toolkit Development Cross-REL working group agenda #11	2 weeks before meeting	
7			7	•	11		þ	Toolkit Development Cross-REL working group memo #11	2 weeks after meeting	
2		•	1	•	12		b	Toolkit Development Cross-REL working group agenda #12	2 weeks before meeting	

2	-	·	2	12	·	Toolkit Development Cross-REL working group memo #12	2 m	2 weeks after meeting	
		·		13		Toolkit Development Cross-REL working group agenda #13 . b	2 m	2 weeks before meeting	
2		·	2	13		Toolkit Development Cross-REL working group memo #13	<u>m</u>	2 weeks after meeting	
2		·		14		Toolkit Development Cross-REL working group agenda #14	2 m	2 weeks before meeting	
2		·	2	14		Toolkit Development Cross-REL working group memo #14	<u>n</u>	2 weeks after meeting	
2	1	·	3.	1		. a Proposal for 18 Month Literacy Cross-REL Public Facing Document	1/	1/31/23	
2	1		3	2		. a 18 Month Literacy Cross-REL Public Facing Product	//9	6/30/23	
	<i>w</i>					Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments	ters,		
2	3	·	1	1		Signed letter(s) of intent with each regional CC in REL Region		4/25/22	4/20/2022
2	3	·	2	1		Year 1 Annual memo of needs sensing between REL and CCs		3/1/23	
2	3	·	2	2		Year 2 Annual memo of needs sensing between REL and CCs		TBD	
2	3	·	3	1		Year 1 Joint needs sensing summary meeting minutes		12/5/22	
2	3	·	3	2		Year 2 Joint needs sensing summary meeting minutes		TBD	
TAS	SK3	- W	'ork	Working in	n P	in Partnership with Stakeholders			
3	1					Conduct needs-sensing and develop partnerships			
3	1		1	1		Partnership ProposalSouth Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)	y:	4/29/2022	4/15/2022
3	1		1	2		Partnership ProposalMississippi Adolescent Literacy (MSAL)		4/29/2022	4/28/2022
3	1		1	3		Partnership ProposalAlabama Research Partnership on Improving English Learner Outcomes (AL ELO)	lish	4/29/2022	4/29/2022
3	_	Ŀ	1	4		Partnership ProposalFlorida K-3 Literacy (FLK3)		11/30/2022	9/20/2022
3	1	·	1	5		Partnership ProposalFlorida Virtual School Partnership (FLVS)		6/30/2022	6/23/2022
3	1		1	9		Partnership ProposalSchool Climate and Literacy (SCAL4GA)		6/30/2022	6/30/2022
3	-	·	<u>.</u>	7		Partnership ProposalNorth Carolina Competency-Based Education Partnership (NCCBE)	rtnership	4/29/2022	4/29/2022

8	-1			~			Partnership ProposalDiversifying the Educator Pipeline at Historically Black Colleges and Universities (HBCUs)	11/30/2022	
т	-			6			New Partnership Proposal	As needed; 2 weeks before meeting	
m	-			. 10	_		New Partnership Proposal	As needed; 2 weeks before meeting	
8	. 2	٠					Maintain partnerships under subtask 3.1		
3		ŀ	1			I	Partnership meeting materials and agendas for Year 1 Quarter 1	4/28/2022	NA
3			2			I	Partnership meeting summary memos for Year 1 Quarter 1	4/28/2022	NA
3	. 2	·	1	. 2		I	Partnership meeting materials and agendas for Year 1 Quarter 2	7/28/2022	7/14/2022
3	. 2	·	2	. 2		I	Partnership meeting summary memos for Year 1 Quarter 2	7/28/2022	7/14/2022
3			1	. 3		I	Partnership meeting materials and agendas for Year 1 Quarter 3	10/27/2022	10/19/2022
3	. 2	·	2	. 3		I	Partnership meeting summary memos for Year 1 Quarter 3	10/27/2022	10/19/2022
3			1	4		I	Partnership meeting materials and agendas for Year 1 Quarter 4	1/26/2023	
3			2	4		I	Partnership meeting summary memos for Year 1 Quarter 4	1/26/2023	
3	. 2	·	1	. 5		I	Partnership meeting materials and agendas for Year 2 Quarter 1	4/27/2023	
3		•	2	. 5		I	Partnership meeting summary memos for Year 2 Quarter 1	4/27/2023	
3		·	1	9 .		I	Partnership meeting materials and agendas for Year 2 Quarter 2	7/27/2023	
3	. 2	·	2	9 .		I	Partnership meeting summary memos for Year 2 Quarter 2	7/27/2023	
3			3			9 1	Summary of Stakeholder Feedback Survey results for partnerships Year 1	11/30/2022	
3		·	3			9 1	Summary of Stakeholder Feedback Survey results for partnerships Year 2	11/30/2023	
TASK	SK 4	- 1	rain	Training,		achi	Coaching, and Technical Support (TCTS)		
4	. 1					L 7	TCTS Projects		
4		٠		*	٠	*	South Carolina Emergent Literacy Professional Learning Community Sarah Hughes		
4	. 1	·	1	. 2	٠	1 1	Proposal	4/29/2022	4/15/2022
4		•	1	. 3	٠	1 1	Materials and Agenda for TCTS Session 1	6/30/2022	6/28/2022
4	. 1	·	1	. 3	٠	2	Materials and Agenda for TCTS Session 2	9/30/2022	9/20/2022
4		·	1	. 5	·	1 I	Interim Project Summary	12/16/2022	
4		·	-		·	3 1	Materials and Agenda for TCTS Session 3	12/30/2022	
4	<u> </u>		-		·	4	Materials and Agenda for TCTS Session 4	3/31/2023	

		\vdash	F	\vdash	\vdash	Stakeholder Feedback Survey	10 working	
4	1		•	4			days after final	
		\dashv	=	\dashv	-		event	
4	1			2	. 2	Coaching Summary and Stakeholder Feedback Survey Summary	6/30/2023	
4	1	. 2	٠	*	*			
4	1	. 2	٠	2	$\frac{1}{1}$	Proposal	4/29/2022	4/28/2022
4	1	. 2	·	3	$\frac{1}{1}$	Materials and Agenda for TCTS Session 1	8/30/2022	6/27/2022
4	1	. 2	٠	3	. 2	Materials and Agenda for TCTS Session 2	9/30/2022	7/19/2022
4	1	. 2	·	3	. 3		10/31/2022	8/22/2022
4	1	. 2	٠	3	4		11/30/2022	9/2/2022
4	1		·	3	. 5		12/31/2022	
4	1	. 2	Ŀ	3	9 .		1/31/2023	
4	1	. 2		3	6 .	Implementation/Facilitators Guide	6/30/2023	
						Stakeholder Feedback Survey	10 working	
4			•	4	-		days after final event	
4				*	*			
		+		1	+	WJ 143/10F		
4			٠	7		Proposal	7/29/2022	7/15/2022
4	1		•	3		Materials and Agenda for Sessions 1-6 on Multisyllabic words and Fluency both grade bands	10/30/2022	
4	1	. 3	•	3	. 2	Materials and Agenda for Sessions 7-10 on Vocabulary, both grade bands	6/30/2023	
				\vdash	\vdash	Stakeholder Feedback Survey	10 working	
4	1	· .	•	4	-		days after final	
4	-	4		*	*	AL ELOSupporting Implementation of Practice Guide	200.0	
4	-	4		1	1	Concept Paper for ALEL-Supporting Implementation of Practice Guide	4/29/2022	4/29/2022
4	-	4	·	2	-	Proposal	6/30/2022	6/13/2022
4	1	4	·	3	-	Materials and Agenda for TCTS Session 1	7/12/2022	7/11/2022
4	1	4 .	·	3	. 2	Materials and Agenda for TCTS Session 2	8/12/2022	8/11/2022
4	1	. 4	_	3	. 3	Materials and Agenda for TCTS Session 3	9/13/2022	9/12/2022
4	1	. 4	·	3	4	Materials and Agenda for TCTS Session 4	10/7/2022	10/6/2022
4	1		٠	3	. 5		11/29/2022	
4	1	4	·	3		Materials and Agenda for TCTS Session 6	1/17/2023	
4	1	4	·	3		Materials and Agenda for TCTS Session 7	2/14/2023	

Agenda for Coaching Session 7 Agenda for Coaching Session 11 Agenda for Coaching Session 12 Agenda for Coaching Session 13
Agenda for Coaching Session 11 Agenda for Coaching Session 12 Agenda for Coaching Session 13
Coaching Session 12 Coaching Session 13
Coaching Session 13
Campa Scotor 13
Stakeholder Feedback Survey
nentation of K-5 Literacy Academies
Concept Paper for FLK5 Implementation of K-5 Literacy Academies
Agenda for TCTS Summer Reading Camp Session 1
Stakeholder Feedback Survey for TCTS Summer Reading Camp Session 1
mmary for TCTS Summer Reading Camp Session 1
Agenda for TCTS Summer Reading Camp Session 2
:- A
Stakeholder Feedback Survey for 1C1S Summer Keading Camp Session 2
Post-event Summary for TCTS Summer Reading Camp Session 2
Agenda for TCTS Content Area Session 1
Agenda for TCTS Content Area Session 2
Agenda for TCTS Content Area Session 3
Agenda for TCTS Content Area Session 4
Agenda for TCTS Content Area Session 5

4		•		4	•	8	Stakeholder Feedback Survey for TCTS Content Area Sessions	10 working days after final event	
4			٠.	2	·	3	Post-event Summary for TCTS Content Area Sessions	10 working days after final event	
4	-	4,	5 .	3		∞	Materials and Agenda for TCTS Differentiated Instruction Session 1	9/30/2023	
4	1		5 .	3	·	9	Materials and Agenda for TCTS Differentiated Instruction Session 2	10/31/2023	
4	1	4,	5	3	٠	10	10 Materials and Agenda for TCTS Differentiated Instruction Session 3	11/30/2023	
4	1	•	. 5	4		4	Stakeholder Feedback Survey for TCTS Content Area Sessions	10 working days after final	
								event	
4	1	•	5 .	5		4	Post-event Summary for TCTS Content Area Sessions	10 working days after final event	
4	1		. 9	*		1	FLVS Identification of Needs		
4	-	<u> </u>	. 9	1	·	_	Concept Paper for FLVS Identification of Needs	6/30/2022	6/23/2022
4	1	<u> </u>	. 9	2		1	Proposal	8/5/2022	7/22/2022
4	1		9	3	•	1	Materials and Agenda for TCTS Sessions 1A and 1B	10/13/2022	10/12/2022
4	1	•	. 9	3	٠	2	Materials and Agenda for TCTS Session 2	12/30/2022	
4	1		. 9	3	٠	3	Materials and Agenda for TCTS Session 3	1/31/2022	
4	1	•	. 9	5	٠	1	Interim Project Summary	12/15/2022	
							Stakeholder Feedback Survey	10 working	
4	_	•	9	4		$\overline{}$		days after final event	
4	1	<u> </u>	. 9	5	·	2	Final Project Summary	3/14/2023	
. 4	1	(7	*	٠	*	SCAL4GA Exploring Relationship between School Climate and School Literacy		
4	1		7	1	٠	1	Concept Paper for SCAL4GA Exploring Relationship between School Climate and School Literacy	6/30/2022	6/30/2022
4	1		7	2	·	1	Proposal	8/31/2022	8/29/2022
4	1	•	7	3	٠	1	Materials and Agenda for TCTS Session #1	10/31/2022	10/18/2022
4	1		7	3	·	2	Materials and Agenda for TCTS Session #2	12/30/2022	
4	1		7	3		3	Materials and Agenda for TCTS Session #3	1/31/2023	
4	1		7	3	·	4	Materials and Agenda for TCTS Session #4	3/31/2023	

4	-	7	F.	ω	. 5	Materials and Agenda for TCTS Session #5	4/28/2023	
	L	\vdash	F			$\overline{}$	10 working	
4				4			days after final event	
4	1	∞		*	*	NCCBE Implementation and Lessons Learned in CBE		
4	1	∞		-		Concept Paper for NCCBE Implementation and Lessons Learned in CBE	4/29/2022	4/29/2022
4	1	~		2		Proposal	6/12/2022	6/1/2022
4	1	~		ж	<u>.</u>	Materials and Agenda for NEEAT TCTS Session #1	9/9/2022	9/7/2022
4	1			3		Materials and	9/9/2022	9/6/2022
4	1	8		3	. 3	Materials and Agenda for NEEAT TCTS Session #2	10/20/2022	10/20/2022
4	1	∞		κ	4	Materials and	1/6/2023	
4	1			3	. 5	Materials and Agenda for NEEAT TCTS Session #4	2/3/2023	
4	1		~	3	9 .	Materials and	3/3/2023	
4	1		~	3	. 7	Materials and Agenda for NEEAT TCTS Session #6	4/7/2023	
4	1			3		Materials and Agenda for NEEAT TCTS Session #7	8/4/2023	
4	1	. 8		3	6 .	Materials and Agenda for NEEAT TCTS Session #8	9/8/2023	
4	1			3	. 10		10/27/2022	10/20/2022
4	1		~	3	. 1	Materials and Agenda for TCTS NEHS Session #3	1/6/2023	
4	1		~	3	. 12	-	1/6/2023	
4	1	. 8		3	. 13	Materials and	8/4/2023	
4	1		~	3	. 14		8/4/2023	
						Stakeholder Feedback Survey NEEAT	10 working	
4		· ·		4			days after final	
	\downarrow	\dashv	\dashv	\dagger	\dashv		event	
						Stakeholder Feedback Survey NEHS	10 working	
4	<u> </u>	<u>∞</u>	~	4			days after final	
4	-	6		*	*	HBCUS Examination of Teacher Preparation Outcomes		
4	-	6	-	-	1		11/30/2022	
4	1			2	1	Proposal	1/31/2023	
4	1	6		κ	1	Materials and Agenda for TCTS Sessions	TBD	
						Stakeholder Feedback Survey	10 working	
4			•	4	-		days after final event	
4	1	10	. 0	*	*	TBD - Year 3 or later	TBD	

4	_		10	-		_	Concept Paner for TPHBCU Examination of Teacher Preparation Outcomes	TBD	
4	1		10	2	<u> ·</u>	1	Proposal	TBD	
4	. 1		10	3	·	1	Materials and Agenda for TCTS Sessions	TBD	
4	. 1	•	10	4	•	1		10 working days after final	
			\exists					event	
4	. 1		11	*	٠	*	TBD - Year 3 or later	TBD	
4	. 1	•	11	1		1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes	TBD	
4	. 1	•	11	2	٠	1	Proposal	TBD	
4	1		11	3		1	Materials and Agenda for TCTS Sessions	TBD	
							Stakeholder Feedback Survey	10 working	
4	<u>.</u>	•	11	4	•			days after final	
4	-	Ė	1	*	+	*	TRD - Vear 3 or later	TBD	
4	-		12		1	-	ent Pane	TBD	
4	-		12	2	<u> </u>	-	Proposal	TBD	
4	-		12	m	<u> </u>	-	Materials and Agenda for TCTS Sessions	TBD	
							Stakeholder Feedback Survey	10 working	
4		•	12	4	٠			days after final	
								event	
4			13 .	*	•	*	TBD - Year 3 or later	TBD	
4		•	13	1	٠	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes	TBD	
4	1		13 .	2	٠	1	Proposal	TBD	
4		•	13 .	3	٠	1	Materials and Agenda for TCTS Sessions	TBD	
							Stakeholder Feedback Survey	10 working	
4	-	•	13	4	•			days after final	
	1	1	,	1	_	·		event	
4	_		14	*	·	*	TBD - Starting Year 3	TBD	
4	1	•	14	_	·	1	Concept Paper for TPHBCU Examination of Teacher Preparation Outcomes	TBD	
4		•	14	2	٠	1	Proposal	TBD	
4		•	14	3	•	1	Materials and Agenda for TCTS Sessions	TBD	
							Summary of Stakeholder Feedback Survey results session 1	10 working	
4		•	4	4	•			days after final event	
4	. 2						Ask an Expert		

4	2	-	1	Ă	Ask an Expert Proposal- FCS Assistance	TBD	3/16/22
4	1 2	2	-	¥		5/5/22	5/5/22
4	2	ω.	-	A		5/19/22	5/18/22
4	2			Ą		TBD	7/13/22
4	2	. 2		Ä	Ask an Expert responses memo	5 working days after each meeting with the requestor	9/15/2022
4	2		. 3	Ą	Ask an Expert Proposal	TBD	
		. 2	. 3	₹	Ask an Expert responses memo	5 working days after each meeting with the requestor	
4	2		4	A	Ask an Expert Proposal	TBD	
4			. 4	¥.	Ask an Expert responses memo	5 working days after each meeting with the requestor	
4	2		. 5	A	Ask an Expert Proposal	TBD	
				₹	Ask an Expert responses memo	5 working days after each meeting with the requestor	
4	2		9 .	Ą	Ask an Expert Proposal	TBD	
	2		9	Ĭ.Ā.	Ask an Expert responses memo	5 working days after each meeting with the requestor	
TASK	K 5 -	App	lied R	esearch	Applied Research and Peer Reviewed Research-based Development Projects		
	1	,	+	C	Conduct original, empirical research and develop products		
ω ω ·	1-		* ~	된 된 전	Evaluating the Implementation of the Emergent Literacy PLC Sarah Herrera Proposal	4/29/2022	4/28/2022

5	<u>.</u>		3	\vdash	Notice of IRB approval or exemption	9/30/2022	9/30/2022
	1	<u>-</u>	4		Data Management Plan	4/29/2022	4/28/2022
5 .	1	1	. 5	Н	OMB clearance package (if applicable to the study)	9/30/2022	9/30/2022
5 .	1	1	9 .	Н	Data sharing agreement	10/14/2022	10/13/2022
5 .	1	1	7		Research Report	6/30/2025	
5 .	1	2	*		AL ELO HQIA+		
5 .	1	2	1		Concept Paper	10/31/2022	
5 .	1	2	. 2		Proposal	4/30/2023	
5 .	1 .	2	. 3		Notice of IRB approval or exemption	6/30/2023	
5	1 .	2	4		Data Management Plan (if applicable to the study)	6/30/2023	
5	1 .	2	. 5		OMB clearance package (if applicable to the study)	6/30/2023	
5	1 .	2	9 .		Data sharing agreement or memorandum of understanding (optional)	8/31/2023	
5 .	1 .	2	7		Research Report	6/30/2025	
5	1	3	*		Toolkit Evaluation: Assisting Students Struggling with Reading: Response to		
-					Intervention and Multi-tier Intervention in Primary Grades Katie Dahlke		
5	1	3.		\dashv	Proposal Toolkit Evaluation	9/29/2023	
5 .	1	3	. 3		Notice of IRB approval or exemption	4/30/2023	
5 .	1	3	4		Data Management Plan	9/29/2023	
5 .	1	3	. 5	Н	OMB clearance package	3/31/2023	
5 .	1	3	9 .	\dashv	Data sharing agreement or memorandum of understanding	5/31/2024	
5	1	3	. 7	\dashv	Research Report	12/15/2025	
5 .	1 .	4	*		TBD		
5 .	1	4	*		TBD Year 3 or later	TBD	
5	1	4	1		Concept Paper	TBD	
5 .	1	4	. 2		Proposal	TBD	
5 .	1	4	. 3		Notice of IRB approval or exemption	TBD	
5 .	1	4	4		Data Management Plan (if applicable to the study)	TBD	
5 .	1 .	4	. 5		OMB clearance package (if applicable to the study)	TBD	
5 .	1 .	4	9 .		Data sharing agreement or memorandum of understanding (optional)	TBD	
5	1 .	4	7			TBD	
5 .	1	5	*		TBD		
5	1	δ.	*	\dashv	TBD Year 3 or later	TBD	
5	1	5.	1	\dashv	Concept Paper	TBD	
· .	1	5		\dashv	Proposal	TBD	

~		. 5	. 3		Notice of IRB approval or exemption	TBD	
5	1	. 5	4	\vdash	Data Management Plan (if applicable to the study)	TBD	
5	1	. 5	. 5		OMB clearance package (if applicable to the study)	TBD	
5	1	. 5	9 .		Data sharing agreement or memorandum of understanding (optional)	TBD	
5	1	. 5	. 7		Research Report	TBD	
5	1 .	9 .	*		TBD		
5	1	9 .	*		TBD Year 3 or later	TBD	
5	1	9 .			Concept Paper	TBD	
5	1	9 .	. 2		Proposal	TBD	
5	1	9 .	. 3		Notice of IRB approval or exemption	TBD	
5	1	9 .	4		Data Management Plan (if applicable to the study)	TBD	
5	1	9 .	. 5		OMB clearance package (if applicable to the study)	TBD	
5	1	9 .	9 .		Data sharing agreement or memorandum of understanding (optional)	TBD	
5	1	9 .	. 7			TBD	
					Toolkit Design: Assisting Students Struggling with Reading: Response		
w ·	7	*	*		to Intervention and Multi-tier Intervention in Primary Grades		
					Marcia Kosanovich		
5	2	. 1	. 2		Proposal Toolkit Development	3/31/2022	3/31/2022
5	2 .	. 1	. 3		Toolkit	7/31/2024	
5	2	. 1			Memo Documenting changes based on usability testing	7/31/2024	
S .	4	*	*		Develop Tools to Support Research Processes and Research-Based Practices.		
5.	4	1	*		TBD		
5.	4				Concept Paper	TBD	
5	4	. 1	. 2		Proposal	TBD	
5	4 .	. 1	. 3		Notice of IRB approval or exemption	TBD	
5	4 .	. 1	4		Data Management Plan (if applicable to the study)	TBD	
5	4	. 1	. 5		OMB clearance package (if applicable to the study)	TBD	
5	4 .	, 1	9 .		Data sharing agreement or memorandum of understanding (optional)	TBD	
5	4	. 1	7		Tool	TBD	
5	4	. 2	*		TBD		
5	4	. 2			Concept Paper	TBD	
5	4	. 2	. 2	\exists	Proposal	TBD	

5	4	2			Notice of IRB approval or exemption	TBD	
٠.	4	2	4		Data Management Plan (if applicable to the study)	TBD	
5 .	4	. 2	. 5		OMB clearance package (if applicable to the study)	TBD	
5 .	4	. 2	9 .		Data sharing agreement or memorandum of understanding (optional)	TBD	
5 .	4	. 2	7		Tool	TBD	
5	9				Conduct assessment of research study quality for ESSA compliance		
5 .	. 5	1	. 1		Concept Paper	As needed	
5 .	5	. 2			Proposal	As proposed	
5	5	. 3	. 1		Study review(s), peer reviewed by WWC contractor if reviewed using WWC standards	As proposed	
5 .	5	4			Summary memo and/or associated materials stakeholders	As proposed	
TASK	9	- Dissemination	emin	ation			
9	1				Develop website content		
			L		N/A		
9	7				Develop Dissemination Materials		
					Infographics/Factsheets		
. 9	2	. 1	. 1		Infographic 1- SCAL4GA Exploring Relationship between School Climate and School Literacy	12/31/2022	
. 9	2	. 1	. 2		Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic	6/13/2022	6/17/2022
. 9	2	. 1	. 3		Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic Factsheet	6/13/2022	6/17/2022
. 9	2	1	4		Infographic/factsheet 4	TBD	
. 9	2	. 1	. 5		Infographic/factsheet 5	TBD	
. 9	2	1	9 .		Infographic/factsheet 6	TBD	
. 9	2 .	1	. 7		Infographic/factsheet 7	TBD	
. 9	2 .	1			Infographic/factsheet 8	TBD	
. 9	2 .	1	6 .		Infographic/factsheet 9	TBD	
. 9	2	. 1	. 10		Infographic/factsheet 10	TBD	
					Audio Files		
. 9	2	2		٠	1 Proposal	As needed	
. 9	2	2			1 Script for audio file 1	TBD	

Proposal for event or required proposal for conference presentation
4
Proposal for event or required proposal for conference presentation

. 9	3	. 2	4		Agenda and materials	2 weeks before	
9	ε.	. 3	4		Stakeholder feedback survey	2 weeks after event	
. 9	3	. 1	. 5	L	Proposal for event or required proposal for conference presentation	TBD	8/30/2022
. 9	3	. 2	. 5		Agenda and materials	2 weeks before event	
. 9	3	. 3	. 5		Stakeholder feedback survey	2 weeks after event	
9	3	1	9 .		Proposal for event or required proposal for conference presentation	TBD	
. 9	3	. 2	9 .		Agenda and materials	2 weeks before event	
. 9	3.	. 3	9 .		Stakeholder feedback survey	2 weeks after event	
9	3.	1	7 .		Proposal for event or required proposal for conference presentation	TBD	
. 9	3	. 2	7		Agenda and materials	2 weeks before event	
. 9	3	. 3	. 7		Stakeholder feedback survey	2 weeks after event	
9	3.	-	8	L	Proposal for event or required proposal for conference presentation	TBD	
. 9	3	. 2	8		Agenda and materials	2 weeks before event	
. 9	3	. 3	~		Stakeholder feedback survey	2 weeks after event	
9	3.	-	6 .	L	Proposal for event or required proposal for conference presentation	TBD	
. 9	3	. 2	6 .		Agenda and materials	2 weeks before event	
. 9	3	. 3	6 .		Stakeholder feedback survey	2 weeks after event	
9	3.	1	. 10	L	Proposal for event or required proposal for conference presentation	TBD	
. 9	3	. 2	. 10		Agenda and materials	2 weeks before event	
. 9	3	. 3	. 10		Stakeholder feedback survey	2 weeks after event	
. 9	3	. 1	. 11		Proposal for event or required proposal for conference presentation	As needed	
. 9	3	. 2	. 11		Agenda and materials	2 weeks before event	
. 9	3.	. 3	. 11		Stakeholder feedback survey	2 weeks after event	
9	4				Newsletters		
. 9	4	. 1			Newsletter 1 April 2022	3/18/2022	3/22/2022

9	4	1			Newsletter 2 May 2022	4/15/2022	4/15/2022
. 9	4	1	. 3		Newsletter 3 June 2022	5/20/2022	5/17/2022
9	4	1	. 4		Newsletter 4 July 2022	6/17/2022	6/17/2022
. 9	4	1	. 5		Newsletter 5 Aug 2022	7/15/2022	7/11/2022
9	4	1	9 .		Newsletter 6 Sept 2022	8/19/2022	8/19/2022
. 9	4	1	. 7		Newsletter 7 Oct 2022	9/16/2022	9/15/2022
. 9	4	1	8		Newsletter 8 Nov 2022	10/14/2022	10/14/2022
. 9	4	1	6 .		Newsletter 9 Dec 2022	11/18/2022	
9	4	1	. 10		Newsletter 10 Jan 2023	12/16/2022	
. 9	4	1	. 11		Newsletter 11 Feb 2023	1/20/2023	
. 9	4	1	. 12		Newsletter 12 March 2023	2/17/2023	
. 9	4	1	. 13		Newsletter 13 April 2023	3/17/2023	
. 9	4	1	. 14		Newsletter 14 May 2023	4/21/2023	
. 9	4	1	. 15		Newsletter 15 June 2023	5/19/2023	
. 9	4	1	. 16		Newsletter 16 July 2023	6/23/2023	
. 9	4	1	. 17		Newsletter 17 August 2023	7/31/2023	
. 9	4	1	. 18		Newsletter 18 Sept 2023	8/31/2023	
. 9	4	1	. 19		Newsletter 19 Oct 2023	9/30/2023	
. 9	4	1	. 20		Newsletter 20 Nov 2023	10/31/2023	
. 9	4	1	. 21	-	Newsletter 21 Dec 2023	11/30/2023	
. 9	2				Maintain a blog		
. 9	5	1	. 1		Blog 1	4/29/2022	4/20/2022
. 9	5	1	. 2		Blog 2	6/30/2022	6/29/2022
. 9	5	1	. 3		Blog 3	8/31/2022	8/23/2022
. 9	5	1	. 4		Blog 4	10/31/2022	10/17/2022
. 9	5	1	. 5		Blog 5	12/16/2022	
. 9	5	1	. 6		Blog 6	2/28/2023	
. 9	5	1	. 7		Blog 7	4/28/2023	
. 9	5	1	8		Blog 8	6/30/2023	
. 9	5	1	6 .		Blog 9	8/31/2023	
. 9	5	1	. 10		Blog 10	10/31/2023	
. 9	5	1	. 11		Blog 11	12/15/2023	
. 9	5	П	. 12	\dashv	Blog 12	2/28/2024	
. 9	5	1	. 13	\dashv	Blog 13	4/30/2024	

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	Comments																		Call was cancelled.											
×	te																				7		7		7					
	Final Date Due		2/21/22	2/9/22	2/23/22	3/9/22	3/23/22	4/6/22	4/20/22	5/4/22	5/18/22	6/8/22	6/22/22	7/13/22	7/27/22	8/10/22	8/24/22	9/4/22	9/21/22	10/5/22	10/19/22	11/2/22	11/16/22	12/7/22	12/21/22	1/11/23	1/25/23	2/8/23	2/22/23	3/8/23
	Approved		NA	2/7/2022	2/18/2022	3/7/2022	3/21/2022	4/6/2022	4/18/2022	5/2/2022	5/13/2022	6/7/2022	6/17/2022	7/11/2022	7/22/2022	8/8/2022	8/22/2022	9/2/2022		10/3/2022	10/19/2022									

3/22/23	4/5/23	4/19/23	5/3/23	5/17/23	6/7/23	6/21/23	7/12/23	7/26/23	8/9/23	8/23/23	9/6/23	9/20/23	10/4/23	10/18/23	11/1/32	11/15/23	12/6/23	12/20/23	2/23/22	3/9/22	3/23/22	4/6/22	4/20/22	5/4/22	5/18/22	6/1/22	6/22/22	7/6/22	7/27/22	8/10/22	8/24/22	00/11/0
																			2/11/2022	3/2/2022	3/18/2022	4/1/2022	4/15/2022	4/29/2022	5/13/2022	5/26/2022	6/22/2022	6/30/2022	7/20/2022	8/3/2022	8/24/2022	0000

10/14/202 10/19/22 10/22 11/202 11/16/22 11/16/22 11/20/22 12/20/22 12/20/23 12/20/23 2/20/23 3/20/23 4/19/23 4/19/23 4/19/23 4/19/23 4/19/23 4/19/23 4/19/23 4/19/23 4/19/23 4/19/23 4/19/23 8/19/23 8/19/23 8/19/23 8/19/23 8/19/23 8/19/23 8/19/23 8/19/23 8/19/23 11/19/23 11/19/23 12/20/22 12/20/22 12/20/22 12/20/22 12/20/22 12/20/22 12/20/22 12/20/22 12/20/22 12	9/15/2022	9/21/22	Call 1.2.2.16 was cancelled, so memo is also cancelled.
	10/14/2022	10/19/22	
11/16/22 11/30/22 11/30/22 12/21/23 2/22/23 2/22/23 2/22/23 3/32/23 4/5/23 4/5/23 4/5/23 4/19/23 5/31/23 6/21/23 7/5/23 8/9/23 8/9/23 10/4/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23 11/16/23	10/26/2022	11/2/22	
11/30/22 12/21/22 12/30/22 11/25/23 2/82/23 2/82/23 3/82/23 3/82/23 3/82/23 4/19/23 4/19/23 5/31/23 5/31/23 5/31/23 6/21/23 7/26/23 8/9/23 8/9/23 8/9/23 10/4/23 11/1/23 11/1/23 11/1/23 11/1/23 12/20/23		11/16/22	
12/21/22 12/30/22 11/25/23 2/8/23 2/22/23 3/8/23 4/5/23 4/19/23 5/31/23 5/31/23 6/21/23 6/21/23 6/21/23 8/9/23 8/9/23 10/18/23 11/1/23 11/1/23 11/1/23 12/20/23		11/30/22	
12.30/22 1/25/23 2/8/23 2/8/23 2/22/23 3/8/23 3/8/23 4/19/23 4/19/23 5/31/23 5/31/23 6/21/23 8/9/23 8/23/23 8/23/23 10/18/23 11/1/23 11/1/23 12/20/23 12/20/23		12/21/22	
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2/8/232/22/233/8/233/8/234/19/235/3/235/31/236/21/237/5/237/5/238/9/238/9/239/6/2310/4/2311/1/2312/6/2312/20/2312/20/2312/20/23		1/25/23	
2/22/233/8/233/22/234/19/235/3/235/3/235/11/236/21/237/26/238/9/239/6/2310/4/2311/1/2312/6/2312/6/2312/6/2312/6/2312/6/2312/29/23		2/8/23	
3/8/23 3/22/23 4/5/23 4/19/23 5/3/23 5/31/23 6/21/23 6/21/23 7/26/23 8/9/23 8/23/23 8/23/23 8/23/23 10/18/23 11/1/23 11/1/23 12/20/23		2/22/23	
3/22/234/5/234/19/235/3/235/17/236/21/237/26/238/9/239/6/2310/18/2311/1/2311/1/2312/6/2312/6/2312/6/2312/6/2312/6/2312/20/23		3/8/23	
4/5/234/19/235/3/235/17/236/21/236/21/237/26/238/9/239/6/2310/4/2311/1/2311/15/2312/20/2312/20/2312/20/23		3/22/23	
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\$/3/23\$/17/23\$/31/23\$(21/23)\$(21/23)\$/2/23\$8/9/23\$9/6/23\$10/4/23\$11/1/23\$12/20/23\$12/20/23		4/19/23	
\$/17/23\$/31/23\$(21/23)\$(21/23)\$7/26/23\$(9/23)\$(9/23)\$(10/4/23)\$(10/4/23)\$(11/15/23)\$(12/20/23)		5/3/23	
5/31/236/21/237/26/238/9/238/23/239/6/239/20/2310/18/2311/1/2312/6/2312/20/23		5/17/23	
6/21/23 7/5/23 7/26/23 8/9/23 8/23/23 9/6/23 9/20/23 10/18/23 11/1/23 11/15/23 12/6/23 12/6/23		5/31/23	
7/5/237/26/238/9/238/23/239/6/239/20/2310/4/2310/18/2311/1/2311/1/2312/6/2312/20/2312/20/23		6/21/23	
7/26/238/9/239/6/239/20/2310/4/2311/1/2312/6/2312/6/2312/20/23		7/5/23	
8/9/23 8/23/23 9/6/23 9/20/23 10/18/23 11/11/23 11/15/23 12/6/23 12/20/23		7/26/23	
8/23/239/6/239/20/2310/4/2311/1/2311/15/2312/6/2312/20/2312/29/23		8/9/23	
9/6/23 9/20/23 10/4/23 10/18/23 11/1/23 11/15/23 12/6/23 12/20/23 12/20/23		8/23/23	
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11/1/23 11/15/23 12/6/23 12/20/23 12/29/23		10/18/23	
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12/20/23		12/6/23	
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		2/28/2022	3/4/2022	4/4/2022					5/15/2022	12/31/2022	7/1/2023
		2/28/2022	3/4/2022	3/30/2022	9/29/2022				5/11/2022		

			5/13/2022	5/25/2022	8/10/2022	8/31/2022	10/20/2022			

5/5/2022	
5/16/2022	
5/31/2022	
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10/12/2022	10/19/2022						

		2/14/2023	7/30/2023	5/9/2022	3/15/2023	12/19/2022		5/31/2022	5/31/2022	5/31/2022	12/30/2022	7/29/2022	7/30/2022	5/31/2022
				4/26/2022				4/19/2022	5/11/2022	5/11/2022		6/29/2022	7/22/2022	5/10/2022

1/14/2023		5/12/2022	5/12/2022	8/11/2022	8/11/2022	11/10/2022	11/10/2022	2/9/2023	2/9/2023	5/11/2023	5/11/2023	8/10/2023	8/10/2023	12/14/2022	12/14/2023		5/31/2022	7/21/2022	10/21/2022	1/20/2023	4/21/2023
				7/14/2022	7/14/2022	10/24/2022	10/24/2022										4/21/2022	7/12/2022	9/30/2022		

	25 working days after	
	final event	
	7/14/2023	
5/3/2022	5/29/2022	
6/30/2022	9/20/2022	
7/20/2022	10/21/2022	
9/7/2022	11/21/2022	
9/9/2022	12/21/2022	
	1/21/2023	
	2/21/2023	
	7/21/2023	
	25 working	
	days after final event	
7/20/2022	8/28/2022	
	11/20/2022	
	7/21/2023	
	25 working	
	days after	
	TILIAL CYCIII	
5/11/2022	5/31/2022	
7/11/2022	7/30/2022	
7/12/2022	TBD	
8/23/2022		
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10/14/2022		
	12/13/2022	
	1/31/2023	
	2/28/2023	

3/28/2023	4/25/2023	8/29/2023	11/30/2023	3/29/2024	5/30/2024	5/12/2023	25 working	days after	final event	6/14/2023	10/30/2022	12/30/2022	TBD	25 working	davs after	final event							
											10/2/2022												

				7/29/2022	9/2/2022	10/27/2022	1/13/2023	2/14/2022	12/29/2022	25 working	days after final event	3/28/2023	7/30/2022	10/15/2022	11/21/2022	1/20/2023	2/21/2023	4/21/2023
				6/29/2022	7/26/2022	10/19/2022							7/22/2022	8/31/2022	10/24/2022			

5/19/2023	25 working days after	final event	5/29/2022	7/12/2022	TBD	TBD								25 working	days after final event	25 working	days after	Tinal event	1/14/2023	3/17/2023	TBD	25 working	days after	
			5/10/2022	6/10/2022	9/12/2022	9/12/2022	10/26/2022				10/26/2022													

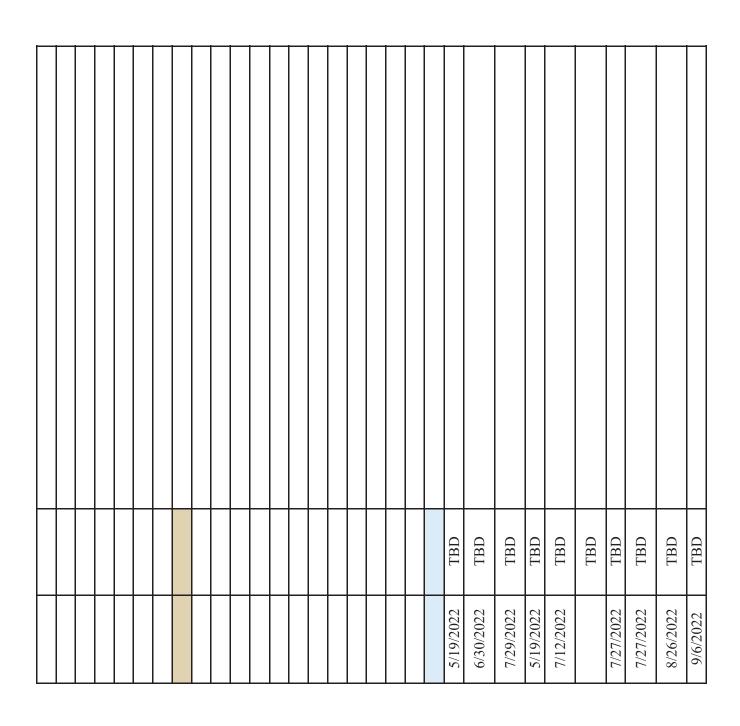
TBD	TBD	TBD	25 working	days after	final event	TBD	TBD	TBD	25 working	days after	final event	TBD	TBD	TBD	25 working	days after	final event	TBD	TBD	TBD	25 working	days after	final event	TBD	TBD	TBD	25 working	days after	final event	

TBD										9/30/2022
3/18/22	5/13/2022	5/19/2022	7/13/22	9/16/2022						7/13/2022

10/21/2022	9/30/2022	2/28/2023	11/4/2022	2/28/2026	11/14/2022	5/21/2023	7/14/2023	7/14/2023	7/14/2023	9/14/2023	TBD	3/31/2023	9/30/2023	3/31/2023	9/30/2023	6/30/2024	9/30/2026							
10/12/2022	7/13/2022																							

								7/29/2022	8/29/2025	9/15/2024						TBD	TBD

								5/20/2023	6/30/2022						
									7/6/2022	7/6/2022					



TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	4/1/2022
		9/6/2022																					3/28/2021

7/14/2024	5/13/2022	8/12/2022	11/14/2022	2/14/2023	5/12/2023	8/14/2023	11/14/2023	2/14/2024			
	4/20/2022	7/27/2022	10/14/2022								

Version Date: November 3, 2022

Performance Work Statement

Regional Educational Laboratory Program, 2022 Cycle

I. Procurement Purpose and Authorizing Legislation

The U.S. Department of Education (the Department) intends to award nine 60-month contracts to qualified entities to serve as the Regional Educational Laboratory (REL) for nine of the 10 REL regions.¹ See Appendix A for the names of the regions and their constituent states or jurisdictions. Each REL will be part of a program of 10 RELs authorized under the Education Sciences Reform Act (ESRA) of 2002, Part D, Section 174 (20 U.S.C. 9564). The REL Program is administered by the National Center for Education Evaluation and Regional Assistance (NCEE) at the Institute of Education Sciences (IES)² in the US Department of Education (the Department).

The authorizing legislation directs RELs to carry out applied research and development, disseminate findings from scientifically valid research, provide support for using research in education decision-making, and coordinate their activities with other technical assistance entities funded through the U.S. Department of Education, such as the Comprehensive Centers and the Equity Assistance Centers. REL products and services must be completed to the quality specifications required by IES.

II. Introduction to the 2022 REL Cycle

The purpose of each REL is to assist practitioners and policymakers in their work to improve outcomes for learners in its region—from early childhood to adulthood—by supporting stakeholders in the generation and use of research, evidence, and evidence-based practices. To achieve that purpose, RELs: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice.

All REL work must be both rigorous and high leverage.

• REL research and development activities are *rigorous* when they meet IES' standards for work that is scientifically valid. REL training, coaching, technical assistance, and dissemination activities are rigorous when they are (a) based on practices that are evidence-based³, and (b)

¹ The REL Southwest contract cycle is 11 months behind the other RELs and will be awarded in fall 2022.

² http://www2.ed.gov/policy/rschstat/leg/PL107-279.pdf

³ The term "evidence-based," generally refers to Tiers 1, 2, and 3 of the evidence levels specified in the Every Student Succeeds Act. However, IES expects the RELs to look for, share, and work with the highest tier of evidence that is available.

- designed and delivered in ways that are consistent with what is known about high-quality adult learning and educator professional development experiences.
- REL work is *high leverage* when it is change-oriented, supporting consequential local, regional or statewide decisions about policies, programs, and practices designed to improve learner outcomes.

RELs Work in Partnership with Key Stakeholder Groups

Working in partnership with key stakeholder groups⁴ is central to the success of the REL Program. RELs are expected to engage partners – that is, leaders and decisionmakers representing key stakeholder groups who work directly in partnership with the REL – in the design, execution, and evaluation⁵ of their activities. Projects that involve key stakeholders in defining their needs and co-designing activities to address these needs are best situated to develop high-quality products and professional learning experiences. An example of such a project is the co-development of activities and/or products that address pressing questions of practice, communicates technically accurate content in plain-spoken ways, and is useful for the intended audience. Similarly, high leverage work as defined above is not possible without RELs working in partnership.⁶

RELs have worked with state departments of education, school districts, and other education stakeholders for more than 50 years, and have formed partnerships with educators and policymakers with the purpose of bridging research and practice for nearly a decade. IES' requirements for partnerships have changed over time. The 2012 REL cycle supported *research alliances*, defined as regional, cross-state, or cross-district groups of practitioners, policymakers, and researchers who worked together over time to use data and research to better understand and address a particular education concern. In the 2017 REL cycle, *partnership* was defined more broadly than research alliances had been under the previous cycle, emphasizing specific features of partnership work. Such features included clear, specific, and actionable outcomes for improvement of some aspect of education; clear strategies for building the capacity of members of the partnership; regular communication with partners; and a commitment to collaborate on a coherent, integrated, well-planned set of activities.

In the 2022 REL cycle, IES emphasizes working in partnership to improve student outcomes. This approach privileges no specific functional form, theory of change, or composition. Instead, the work of RELs should be purpose-built to meet partners' specific needs. So long as the partner (1) identifies the high leverage need to be addressed, and (2) is actively involved in the design, execution and evaluation of a project or set of related projects, work is considered to be done in partnership. Sets of REL projects done in partnership may take different forms and involve different members across the duration of the

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⁴ Stakeholder groups include but are not limited to state education agencies (SEAs), local education agencies (LEAs), state and local school boards, institutes of higher education (IHEs), schools funded by the Bureau of Indian Affairs, as well as student, parent, and community organizations. "Key stakeholders" generally refers to those with decision-making authority and the ability to influence policy or practice in their organization. The REL program as a whole is required to allocate no less than 25 percent of the program's annual resources to meeting the needs of rural areas, as defined by the U.S. Census Bureau. Additionally, each REL has a Governing Board that is comprised of the chief state school officer, or their designee, for each state or jurisdiction in a REL region, as well as other regional stakeholders. Governing Boards provide RELs strategic direction, including prioritizing which regional needs should be the focus of the REL's work.

⁵ Evaluation of activities will be discussed in the *Scope of Work/Requirements* section.

⁶ See the *Expectations for the Implementation of the REL Program* section for additional information on working in partnership.

work. There are few restrictions on the groups with which RELs may partner, or how REL's work in partnership is realized.

RELs Conduct Three Types of Activities

The authorizing legislation for the REL Program requires that RELs conduct three main activities: (1) applied research, which in this cycle IES explicitly extends to include *development activities* that translate scientifically valid evidence into tools for practitioners and interventions to meet unaddressed educator needs; (2) technical assistance related to application and use of scientifically valid research; and (3) dissemination of scientifically valid research. IES expects most REL partnerships will leverage activities of each type to meet their outcomes.

Each type of activity is described here in an intentionally general manner. IES allows flexibility for RELs and their partners to undertake work under each of these activities that best fits their needs. The *Scope of Work/Requirements* section provides additional detail on each activity type.

Training, coaching, and technical support for use of research

ESRA defines technical assistance as:

A) assistance in identifying, selecting, or designing solutions based on research, including professional development and high-quality training to implement solutions leading to— (i) improved educational and other practices and classroom instruction based on scientifically valid research; and (ii) improved planning, design, and administration of programs; (B) assistance in interpreting, analyzing, and utilizing statistics and evaluations; and (C) other assistance necessary to encourage the improvement of teaching and learning through the applications of techniques supported by scientifically valid research.⁷

RELs meet this mandate by conducting training, coaching, and technical support (TCTS) activities. In general, the REL Program focuses its TCTS work on activities that leverage RELs' unique expertise in rigorous research, evaluation, and the design and use of evidence- based practices. All TCTS activities should be aligned to the existing evidence base or involve building stakeholder capacity to build new evidence where little or none exists. TCTS that has as its primary aim the implementation of an "off-the-shelf" evidence-based practice, absent complementary activities that leverage REL capacities, should be supported by other education technical assistance providers.

TCTS projects may stand alone or be used in service of other activity types such as applied research and development projects. For example, TCTS activities can occur before or during an applied research project to help partners understand existing evidence or collect local, relevant data on the high leverage topic of interest. TCTS activities can also occur after an applied research project is completed with the goal of exploring implications of, and next steps from, the research. These activities are discussed in more detail in the *Scope of Work/Requirements* section under Task 4.

Applied research and development

ESRA describes *applied research* as directed to the advancement of practice in education. It addresses complex questions about teaching and learning; the organization of schools and systems; access to educational opportunity; learner success; and how education relates to, and prepares learners for, success

⁷ See 20 USC § 9501 (23).

in life and work. *Development* refers to the systematic use of knowledge to create products or processes; here, those products should support stakeholders' efforts to improve learner outcomes.⁸

The applied research and development work conducted by RELs must be high leverage. That is, it should be change-oriented, supporting consequential local or regional decisions about policies, programs, and practices designed to improve learner outcomes. Ideally, the knowledge and tools developed by individual RELs would be generalizable to multiple contexts. However, this is not a requirement provided the applied research or development product meets the needs of local or regional stakeholders. Similarly, applied research and development products may take any appropriate format so long as they are designed to be both useful to and used by decisionmakers or practitioners.

Applied research and development tasks are discussed in more detail in the Scope of Work/Requirements section under Task 5. Offerors should take special note of Subtask 5.2, which requires each REL to develop at least one research-based toolkit to support educators' use of evidence-based practices found in What Works ClearinghouseTM Practice Guides.

Dissemination

ESRA defines dissemination as:

the communication and transfer of the results of scientifically valid research, statistics, and evaluations, in forms that are understandable, easily accessible, and usable, or adaptable for use in, the improvement of educational practice by teachers, administrators, librarians, other practitioners, researchers, parents, policymakers, and the public, through technical assistance, publications, electronic transfer, and other means.9

RELs are honest brokers and effective synthesizers of scientifically valid information in an age where information of varying quality is ubiquitous and readily transmitted. IES's goal is for the REL "brand" of dissemination to convey quality, objectivity, and timeliness. When possible, REL dissemination activities should include opportunities to learn and connect with others.

Dissemination products and activities should be understandable, easily accessible, and usable. Products should not require substantial additional adaptation by stakeholders for use in the improvement of educational practice or the informing of educational policy.

REL's dissemination activities and products should also be strategic. Dissemination activities, products, and strategies should be developed and implemented to advance partnership work and the outcomes REL partners and other key stakeholders intend to achieve in their locality, state, or region. Except where otherwise specified, dissemination activities specifically designed for national audiences are a secondary consideration of individual RELs.

These activities are discussed in more detail in the Scope of Work/Requirements section under Task 6.

⁸ ESRA contrasts applied research and development with basic research, which does not necessarily have immediate or obvious implications for practice. Both types of research differ from other forms of informationgathering, such as compiling facts or statistics, documenting policies without analysis or scholarly interpretation, or generating and reporting on performance indicators.

⁹ See 20 USC § 9501 (10)

III. Expectations for the Implementation of the REL Program

As stated in the *Introduction to the 2022 REL Cycle*, the purpose of each REL is to support stakeholders in the use of research and evidence to improve outcomes for learners in its region from early childhood to adulthood. Current and previous REL cycles have demonstrated that there are many ways RELs can achieve this goal.

In general, the needs, desired outcomes, and context of their partners should inform the development and execution of REL projects. As noted above, IES believes this way of working maximizes the chances that RELs meet partner needs and help partners realize their desired outcomes. IES has identified a set of overarching expectations for how the work of the REL will be implemented, identified below.

RELs shall conduct all (1) applied research and development and (2) TCTS work in partnership using the most effective structure possible. The structure and features of work done in partnership should be defined by the nature of the work RELs and their partners intend to complete and the outcomes they seek to accomplish. IES expects that RELs will engage all stakeholders whose participation in the partnership is needed to realize the partnership's outcomes. This includes but is not limited to individuals, regional or local organizations, and professional associations with the authority to set, influence, or implement policy and practice; access data; provide content or context expertise; or generate awareness of, or buy-in to, specific evidence-based actions or outcomes identified by REL partners.

Regardless of the form work done in partnership takes, IES expects *good partnering behaviors* in all relationships between RELs and their partners. REL projects shall be co-developed with the partners they are intended to serve. Additionally, REL work should be characterized by effective communication; genuine cooperation; and a mutual understanding of the context, content, outcomes and targets of the work.¹⁰

Work done in partnership shall focus on concerns that are narrowly tailored to increase the likelihood of achieving partners' desired outcomes. REL projects should emphasize deep work on a specific problem, rather than diffuse work across a broad topical area. For example, a REL project or set of projects should not focus broadly on "early childhood education" but rather on a particular issue such as "improving the skills and knowledge of early childhood educators related to 1) formatively assessing children's language and mathematics development, and 2) applying that knowledge to practice."

RELs shall work in partnership with groups within a single state or jurisdiction. The work of REL partnerships should generally focus on statewide or local needs to increase the likelihood of achieving partners' desired outcomes. IES expects that RELs will work to serve all states in their region; however, differences in policy contexts and partner needs often make it difficult for multi-state partnerships to set specific shared targets and successfully execute high leverage work. Partners within a state may include statewide organizations (for example, SEAs, state boards of education, IHEs/teacher preparation programs, or professional organizations), regional organizations (for example, Intermediary Units that support groups of schools or districts within a state), districts, or individual schools. Work may be done in partnership with representatives from any combination of these levels if doing so is necessary to achieve

¹⁰ Outcomes are defined by the domains within which partners wish to see change – for example, improved math proficiency rates for middle school students in New Jersey. Targets are specific, measurable, time-bound metrics associated with long-term outcomes – for example, 85 percent of middle school students achieving proficiency on the statewide mathematics assessment by 2027.

their outcomes. RELs may also leverage Communities of Practice to connect stakeholders across states within a REL region that have similar needs (see Subtask 3.3 in the *Scope of Work/Requirements* section).

REL activities shall have a demonstrable, credible relationship to improved learner outcomes. The REL Program's purpose is to improve learner outcomes by supporting partners in the generation and use of research, evidence, and evidence-based practices. Therefore, the work of the RELs shall be actionable. That is, oriented towards solving, rather than simply describing, high-leverage problems of practice. Specifically:

- Activities should be in service of outcomes that are (a) co-designed with partners, (b) address authentic needs based on needs-sensing activities, (c) clear and measurable, and (d) have achievable, specific targets associated with these outcomes.
- Outcomes should be classified as short-term, medium-term, or long-term. Details as to the types of outcomes that are appropriate for each are described below in the *Key Outcomes for REL Work and Logic Model* section.
- Partners' long-term goals should serve as a "north star" for the work of RELs. REL work should be in service of their partners' goals (e.g., "doubling the rate of math proficiency among 3rd graders in <partner's LEA> over the next ten years"). Targets for RELs' work and outcomes visà-vis the partners' goal should be appropriate to the opportunities and constraints of the REL Program.
- All <u>REL</u> outcomes and their associated targets should be attainable within the REL cycle's current period of performance. When partners have goals that extend beyond the period of performance (e.g., "by 2030, 95% of 3rd grade students in partner's LEA> will have achieved proficiency in math on the state test"), REL outcomes and targets should be appropriately tuned to the Program's opportunities and constraints (e.g., "At the end of the REL cycle, the REL and its partners hope to show a demonstrable increase in student growth relative to the students' baseline on all relevant domains of the progress monitoring assessment for 3rd grade math in all elementary schools in which teachers participated in trainings during the 2023-24 school year).
- Related projects developed in partnership with stakeholders will typically have the same longterm outcomes. Sets of projects co-developed with the same group may be intended to lead to distinct short- and medium-term outcomes, so long as they build on one another to help partners achieve shared long-term outcomes.
- RELs should be able to demonstrate—via logic models, theories of change, or equivalent—how activities they propose to undertake in partnership will be arrayed to meet their short-, medium-, and long-term outcomes. REL activities are a means to an end, not ends unto themselves.
- On-going monitoring of a REL's performance will be informed in part by its attainment of targets associated with short-term and medium-term outcomes; summative evaluation of a REL's performance will be informed in part by its attainment of targets associated with long-term REL outcomes.

RELs shall focus on activities that leverage their distinctiveness in the federal technical assistance space and develop strategies for collaboration with other federal service providers to meet needs that lie outside RELs' core competencies. RELs' distinctive value in the federal technical assistance community comes from their ability (a) to conduct applied research and development work that is rigorous and high leverage, and (b) to integrate that work with training, coaching, technical support, and dissemination that is of similarly high quality. RELs must consider how partner or other stakeholder needs that do not leverage that distinctiveness—such as implementation support absent a discernable applied research and development component—should be referred to other technical assistance providers

such as the Regional Comprehensive Centers. RELs shall coordinate and participate in joint needs sensing activities with other federal technical assistance providers—in particular the Regional Comprehensive Center(s) that serve their region—to help inform such decisions on where regional needs are best addressed.

RELs shall emphasize the scaling of What Works Clearinghouse (WWC) Practice Guide recommendations and should amplify and leverage scientifically valid research and evidence-based practices built or synthesized elsewhere within IES. Discovering what works in education and then ensuring that knowledge is used to improve learners' education outcomes is central to the mission of IES and the REL Program. Similarly, evidence-based practice is a central tenet of the Elementary and Secondary Education Act and Every Student Succeeds Act. In the 2022 cycle, RELs support the use of evidence-based practices in two ways.

First, each REL shall develop at least one toolkit that supports scaling of WWC Practice Guide recommendations. WWC Practice Guides have a unique role within the evidence-based practices space. Their recommendations represent the IES's current and best understanding of evidence-based practice in a given domain. Some Practice Guides present a set of recommendations in which all recommendations should be implemented to achieve the intended outcomes, while other Practice Guide recommendations may be implemented independently of the other recommendations. More information about this activity is described in the *Scope of Work/Requirements* section under Subtask 5.2.

Second, each REL shall seek to amplify evidence and evidence-based products developed by other IES programs such as the National Center for Education Research, the National Center for Special Education Research, and the National Center for Education Evaluation and Regional Assistance when developing TCTS projects or dissemination materials.

RELs shall develop and employ strategic dissemination plans based on the products developed, their intended outcomes, their target audience(s), and the networks through which evidence and evidence-based practice may be disseminated for said audience(s). A strategic dissemination plan should incorporate the context and intended outcomes of the projects as well as dissemination practices and networks that are most likely to be effective for reaching target audiences. In order to develop and execute these strategies, RELs, with input from their partners, must be able to identify key audiences positioned to support partners in achieving their intended outcomes, target dissemination products and activities towards these audiences in places and through networks and knowledge brokers so that these audience are likely to find them, and develop/disseminate products in formats that are accessible and actionable to these audiences.

IES expects that dissemination plans will require coordination across tasks – in particular, between Task 3 (Working in Partnership with Stakeholders), Task 4 (Training, Coaching and Technical Support for Evidence Use), Task 5 (Applied Research and Peer Reviewed Research-based Development Projects) and Task 6 (Dissemination). IES also expects that dissemination strategies will be individualized and tailored to each set of projects developed in partnership. Simply making products or activities available through the REL's website or Twitter account is not sufficient, nor does it reflect the level of planning or effort IES expects RELs to put forth as part of a strategic dissemination effort.

RELs shall intentionally seek opportunities to work with partners to address issues related to educational equity. Researchers have established that racial and ethnic minorities, children from low-

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¹¹ Successful offerors will be expected to develop the toolkit they propose; however, the government retains the right to make changes to this Subtask after award.

income backgrounds, and children who are not proficient in English, oftentimes do not have the same educational opportunities as their counterparts who are White, from higher income backgrounds, and are proficient in English. ¹² These disparate opportunities and resulting experiences have contributed to significant racial, economic, and English language achievement gaps, ¹³ which may have been exacerbated by the Coronavirus pandemic. ¹⁴ Education practitioners, policymakers, and researchers fear millions of students may have fallen further behind after the U.S. transitioned from in-person education in March 2020 to a mostly virtual environment that resulted in inequitable access to learning opportunities for historically underserved students. ¹⁵ Furthermore, the social justice movement of 2020 prompted IES to think more critically about who is included in conversations about the high leverage needs the REL Program addresses and how the Program may benefit from including more diverse stakeholder groups.

What this means for the REL Program:

- IES encourages RELs to propose projects that have the explicit goal of addressing educational equity. These projects might illuminate the differential experiences, opportunities, and outcomes of learners from historically underserved communities and should identify and promote effective or promising solutions for addressing these inequities. RELs play an important role in contributing to the growing body of research on how experiences within the country's education system differ by context and student group, thereby impacting outcomes, and identifying potential solutions.
- Whenever feasible, RELs shall seek opportunities to partner with students, parents, and community stakeholders—particularly those from historically underserved communities—to determine the focus of and inform REL work. RELs could partner with these stakeholder groups to design, execute, and interpret research studies and their findings, ¹⁶ or to determine the focus of and participate in TCTS activities. RELs might also consider how to include these stakeholder groups in needs sensing activities or projects that include root cause analysis. Since REL staff may not have direct access to students, parents, or community members, LEAs, SEAs, and/or other partners may need to help facilitate this relationship. IES acknowledges that not all projects may yield themselves to including these stakeholder groups; however, it is important for the REL Program explore this new opportunity to understand how including these partners might help improve learner outcomes. IES plans to provide support to RELs to do this work successfully.

¹² U.S. Department of Education Office for Civil Rights. (2016). 2013–2014 civil rights data collection. A first look: Key data highlights on equity and opportunity gaps in our nation's public schools. Washington, DC: U.S. Department of Education. https://www2.ed.gov/about/offices/list/ocr/docs/2013-14-first-look.pdf. (accessed 1/5/2021); Kostyo, S., Cardichon, J., & Darling-Hammond, L. (2018). Making ESSA's equity promise real: State strategies to close the opportunity gap. Palo Alto, CA: Learning Policy Institute. Retrieved on January 5, 2021 from https://learningpolicyinstitute.org/product/essa-equity-promise-report.

¹³ Hussar, B., Zhang, J., Hein, S., Wang, K., Roberts, A., Cui, J., Smith, M., Bullock Mann, F., Barmer, A., and Dilig, R. (2020). The Condition of Education 2020 (NCES 2020-144). U.S. Department of Education. Washington, DC: National Center for Education Statistics. Retrieved on January 5, 2021 from https://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2020144.

¹⁴ Dorn, E., Hancock, B., Sarakatsannis, J., & Viruleg, E. (2020). COVID-19 and learning loss – disparities grow and students need help. McKinsey & Company. Retrieved on January 5, 2021 from https://www.mckinsey.com/industries/public-and-social-sector/our-insights/covid-19-and-learning-loss-disparities-grow-and-students-need-help.
¹⁵ Ibid.

¹⁶ See Subtask 5.6 in the Scope of Work and Requirements section for additional information.

RELs shall employ strategies that integrate applied research; training, coaching, technical support; and dissemination in order to maximize the possibilities of partners meeting their short-, medium-, and long-term outcomes. REL activities can be fit discretely into one of the three categories of REL work – (1) applied research; (2) training, coaching, and technical support; or (3) dissemination. However, IES expects that RELs will realize the greatest impact for partners and stakeholders when they integrate multiple types of work within partnerships and across their entire portfolio of work. Examples of integration might include, but are not limited to developing infographics or hosting a webinar based on the findings of an applied research project; developing a TCTS project to support partners' collection of data for a future applied research project; developing a coaching project to help partners determine "what's next" based on the implications of an applied research project; or developing a training project for instructional leaders based upon a toolkit or intervention developed by the REL.

The content and design of REL work shall be informed by, align with, build upon partners' existing initiatives and their efforts to improve policies and practices. RELs should (a) make all necessary efforts to understand the existing policy and practice context of all their stakeholders; (b) reflect an awareness of those contexts when planning with partners about how new activities can move them closer to achieving their outcomes; and (c) build partner capacity to execute all phases of an evidence-informed process of change.

At a minimum, REL work should be developed with an understanding of the state and local context in order to avoid duplication of effort or contradiction with existing initiatives or practices. Beyond that, REL project proposals should demonstrate how the work is part of a logical and feasible pathway to achieving partners' intended outcomes, in conjunction with other activities or initiatives taking place in partnership with, or outside of the REL. For example, a project in which the REL is supporting a networked improvement community of school curriculum leaders within a district in their efforts to help teachers identify, understand, and implement evidence-based instructional practices in early reading will be most successful if it builds upon existing teacher supports that the district provides and is followed by sustained district investment. Projects that are unable to demonstrate this – in other words, "one-off" projects that are not supported by additional REL work or partner initiatives outside of their work with the REL – are less likely to effectively support stakeholder change efforts and meet the criteria of high leverage. RELs should also coordinate with other federal technical assistance providers when designing research and training, coaching, and technical support projects to avoid duplication and maximize the benefit of federally funded supports.

Additionally, work in partnership should be designed to support partners in identifying and acting on the necessary next steps to achieve their outcomes. Part of this could include RELs acting as a thought partner to plan for what partners will do once REL supports have concluded. Another aspect of helping partners take next steps may involve reaching out to other stakeholder organizations with whom partners may not typically work. Partners for REL projects may include many, but not all, of the decisionmakers whose buy-in is necessary for achieving intended outcomes. In these cases, the REL could work in partnership to build the knowledge and capacity of partners to be able to clearly and persuasively champion potential evidence- based changes to outside decisionmakers and other stakeholders. Therefore, the REL, through partnerships, will need to become knowledgeable not only of their partners and their partners' contexts, but also of their partners' relationships to other key decisionmakers and the organizational processes of each relevant group.

REL activities shall be designed and executed in a culturally responsive manner. RELs shall make all necessary efforts to understand the cultural context of their partners at the state, region, district, or school level and use that knowledge to design and conduct high leverage work.

Cultural context can have several meanings, but generally relates to how stakeholders interact within education and social systems and their beliefs, values, norms and behaviors. RELs should recognize that these beliefs, values, norms, and behaviors are likely to be different across the various stakeholder groups within a system. As RELs think about how to best meet their partners' needs around a given topic, they should also seek to understand the answers to questions such as: What does each relevant stakeholder group believe is the problem? What current norms might support or inhibit the adoption of a new practice or policy? What role does tradition play and how can it be used to support change?

REL personnel shall include researchers with significant and demonstrated scholarly expertise in content areas and methodologies relevant to the work the REL undertakes as well as practitioners who have significant experience teaching and leading professional development in those content areas. RELs shall develop a team that includes experts of several types, listed below:

- Content experts who possess a broad and deep perspective on what is known and what still is not settled in a research field. They enable the REL to frame important research questions and TCTS activities so that they both address immediate needs for evidence, as well as advance knowledge more broadly through applied research.
- Lead authors of REL reports who shall have demonstrated expertise in the content area being addressed by the report, shown through a substantial portfolio of peer-reviewed, published work in that area.¹⁷
- Methodological experts who ensure high leverage research questions are answered using appropriate methods and support the intended outcomes of the project.
- Current or recent practitioners who provide project staff additional context on problems of practice educators are facing.
- Experts in adult learning or professional development who can lead and inform the design and conduct of TCTS activities.

IES expects that the REL shall seek content expertise from a variety of sources, including universities or other firms, and shall adjust its mix of content expertise as new regional needs arise.

REL products shall be clear, engaging, relevant, and actionable. Products should be written for an informed lay audience. Non-researchers with limited statistical backgrounds should be able to understand key takeaways and implications from all products, including applied research. RELs shall incorporate formative feedback from at least one representative of the target audience when developing products to maximize their relevance, usability and actionability. RELs are encouraged to use multiple formats and to develop supplemental products to support research findings to make these findings as clear, engaging, relevant, accessible and actionable as possible to multiple audiences.

IES' primary concern is that the REL products are actionable for partners toward achieving their outcomes (see earlier expectation related to strategic dissemination). However, REL products should also be nationally relevant whenever possible so that other states, districts, and schools can adapt and implement the research knowledge, tools and trainings created through the REL partnership. RELs shall provide sufficient contextual information as a part of each applied research product so that users may be able to compare the context in which the work was conducted to their own when considering its relevance.

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¹⁷ See https://eric.ed.gov/?selection for IES' definition of peer-reviewed.

Applied research products shall incorporate quantitative methodologies best suited to answer partners' questions and address their high leverage needs. Applied research under the REL Program may use any quantitative methods, ranging from descriptive statistics to causal models, that are appropriate to meet partner needs. As discussed above, IES expects REL products to be high-leverage and actionable, with a focus on achieving partners' medium- and long-term outcomes. Therefore, while descriptive research is permitted, IES expects that descriptive research will not be conducted as a standalone project and will instead be combined with other REL supports that help partners and other stakeholders apply research evidence to policy or practice. For the purposes of research under the REL Program, qualitative research methods are typically best used in combination with quantitative methods rather than in isolation. For example, case study data can be used to provide examples of the types of implementation approaches that may be listed in survey response categories within an implementation evaluation.

IES encourages RELs to look for opportunities to conduct studies that build upon extant data by collecting data on implementation in real time in order to help stakeholders understand the variation in implementation, the challenges associated with implementation and educators' strategies for overcoming these challenges. Such studies would need to be launched early in the contract cycle because they would likely require Office of Management and Budget (OMB) clearance after the study proposal was approved by IES before the study could begin, as well as additional time to recruit participants and collect data.¹⁸

IV. Key outcomes for REL work and logic model

IES has identified several short-, medium-, and long-term outcomes anticipated from the work of RELs and the REL Program (see Figure 1). Given the wide variety of topics and activities of REL projects, it would be nearly impossible to capture every potential input, activity, output, and outcome of REL work. The logic model depicted in Figure 1 represents a high-level overview of the work of RELs and of the REL Program itself. IES does not include arrows linking specific inputs, activities, outputs, and outcomes in this model. However, IES' expectation is that as each REL co-develops and executes their scope of work they will demonstrate through logic models how specific components of their models are linked for each set of projects developed in partnership (see Task 3 under *Scope of Work and Requirements* for additional information).

As noted in the *Expectations for Implementation of the REL Program* section, RELs will be expected to work with their partners to co-develop and periodically update detailed logic models, theories of action or equivalent for each set of projects developed in partnership. ¹⁹ Measurement plans that allow the REL to quantify their progress toward achieving specified targets associated with short-, medium-, and long-term outcomes are also required. While the specific short- or medium-term outcomes in REL logic models might not match those in Figure 1, all applied research, coaching, training, and technical support activities shall be designed to support partners in meeting at least one of the five types of long-term outcomes listed in Figure 1.

¹⁸ The OMB clearance process takes a minimum of five months.

¹⁹ This will also be required for single (stand-alone) projects lasting more than six months; while IES expects most if not all REL work to be done through multiple projects with a set of stakeholders, IES will make limited allowances for stand-alone projects if the REL demonstrates the high-leverage nature of the proposed work.

Inputs

Although each REL project will include distinct inputs, some inputs should be common across any REL project. These include the experience and expertise in research, policy, and practice that RELs and their partners bring to a project. Partners' connections to other key stakeholders and their contextual knowledge is also a valuable input.

Buy-in on the part of partners, and the availability of REL and partner resources is also necessary. For RELs and partners, this includes time commitments necessary to be responsive to communication and participate in meetings or activities. This also includes time and effort to take the necessary steps to further project outcomes; for example, facilitating access to data for an applied research study or making phone calls to set up meetings with additional key stakeholders whose buy-in is critical for a project to meet its medium- or long-term outcomes.

This may also involve financial resources, such as RELs using travel funds to accommodate a face-to-face meeting with partners, or partners paying for substitute teachers so that teacher leaders may attend a REL coaching or training session.

Activities and Outputs

REL activities and outputs are described in greater detail in both the *Expectations for the Implementation of the REL Program* and *Scope of Work and Requirements* sections. While there are some broad categories of REL activities and outputs listed in the REL Program Logic Model, this is not meant to be an exhaustive list of all possible activities RELs may pursue. Similarly, RELs will have flexibility in proposing what types of outputs or products are developed within these broad categories outlined in the REL Program Logic Model so long as the content and structure of each activity and output is clearly, directly, and credibly linked to specific outcomes, particularly the medium- and long-term outcomes listed in Figure 1.

Short-Term Outcomes

Short-term outcomes of REL activities usually include building partners' knowledge and/or capacity for understanding research and translating that research or evidence into practice. Capacity building may include improving partner and/or stakeholder capacity to access, analyze, and interpret data, critically examine the quality of research evidence, or effectively communicate research findings and their implications to other key stakeholders. Short-term outcomes are not limited to capacity building, but other short-term outcomes typically follow some type of increase in partner capacity. These can include, but are not limited to, partners identifying a specific practice that they wish to adopt or adapt or increased support for an evidence-informed action among key stakeholders not directly involved as partners for a project.

Medium-Term Outcomes

Medium-term outcomes usually include partners or other key stakeholders taking action to change policy or behaviors, such as the adoption and implementation of a policy or practice. (Sustaining a policy or practice proven to be effective can also be a medium-term outcome.) Sustained implementation of continuous improvement processes among partners is also considered a medium-term outcome that can lead to other medium-term outcomes such as the identification, adaption, and adoption of new practices and policies. In cases where projects are completed near the end of the REL cycle, medium-term outcomes may not be observable until the end of the contract cycle.

Long-Term Outcomes

As discussed under the *Expectations for the Implementation of the REL Program* section, REL outcomes and targets should be appropriately tuned to the Program's opportunities and constraints, while also being informed by partners' goals, which should act as a "north star" to inform REL outcomes.

Most REL partners' long-term goals of interest are improvements in meaningful measures of learner achievement (e.g., end-of-grade proficiency tests, graduation, or entering the workforce). Those goals typically have distinct numeric targets partners hope to achieve. Other long-term goals may include sustained, systematic organizational change and improved educator effectiveness, precursors to the learner academic, behavioral, or workforce outcomes that are typically of interest to state and local practitioners and policymakers. Often, partners cast these goals and their associated targets as being in the more distant future, years after the REL contract will end.

While acknowledging that partners' long-term goals of interest may not be achievable within the timeline of the REL cycle, RELs should identify targets for their projects' long-term outcomes that are (1) consistent with the partner's long-term goal but (2) attainable within the period of performance. Per the example mentioned under Highlighted Expectations for the Implementation of the REL Program, a partner might set a districtwide proficiency rate target of 95% by 2030 for grade 3 standardized test scores in mathematics, while the REL adopts a long-term outcome of a demonstrable increase in student growth by the end of the REL period of performance relative to the students' baseline on all relevant domains of the mathematics progress monitoring assessment for 3rd grade in all elementary schools in which teachers participated in trainings during the 2023-24 school year. The REL would be expected to report both students' baseline scores and the latest available student scores at the end of the contract period. The target associated with the long-term outcome should be specific and narrow, yet aligned to the partner's long-term goal, with the presumption that a successful districtwide scaling effort would allow the district to achieve their long-term goal by 2030.

Offerors are encouraged to identify high-leverage projects, or sets of projects, to be done in partnership as early as possible in the contract cycle so that there is sufficient time in the REL contract to support the partners in achieving the medium- and long-term outcomes. However, RELs may propose sets of related projects to be done in partnership that include individual projects which may not be completed until the last few months of the REL contract, meaning that there may not be time to examine the associated long-term outcomes of that project. Such projects are allowable on a limited basis so long as the REL demonstrates the high-leverage nature of the proposed work and clearly outlines actions their partners are likely to take on their own after the REL contract expires to support their long-term outcomes. RELs are still expected to identify their partners' long-term outcomes and targets beyond the REL cycle even in such cases.

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Figure 1. REL Program Logic Model

districts and schools are interested in, or sometimes required to, implement evidence-based policies and practices as a way of reaching those goals. RELs are in a position to leverage their research expertise and their partners' contextual knowledge to build partner and/or stakeholder capacity to intentionally general as it relates to the outputs, short- and medium-term outcomes of REL work, all REL projects should have at least one of the Problem statement: States, districts, and schools across the Pre-K-20 spectrum have goals related to improving student outcomes. Many states, determine and implement evidence-informed actions that ultimately support the improvement of student outcomes. While this model is five types of long-term outcomes in this logic model. That outcome should be specific and measurable.

Long-term Outcomes	Sustained, systematic organizational change Improved educator effectiveness Improved academic outcomes Improved behavioral outcomes Improved early career outcomes
Medium-term Outcomes	Adopt, expand, or continue evidence-informed practice Adopt, expand, or continue evidence-informed policy Implement continuous improvement processes
Short-term Outcomes	Build partner capacity to: 1. Apply evidence 2. Access and interpret data 3. Examine quality of extant equality of extant example. 4. Effectively communicate research findings key stakeholder support for evidence informed practice
Outputs	Applied research TCTS Tools Dissemination products
\wedge	
Activities	Needs sensing Establish & maintain partnerships TCTS development Tool development Dissemination Research activities Governing board meetings
Inputs	Expertise Contextual Knowledge Partner buy-in REL and partner resources

V. Scope of work and requirements

Task 1: REL Management and Reporting

Subtask 1.1 Participate in a kickoff call with ED and attend a REL kickoff meeting.

Within one week after the effective date of the contract, the REL shall schedule a call with the IES's Contracting Officer's Representative (COR), Contracting Officer (CO), and Contract Specialist (CS) to introduce the key personnel and discuss expectations of the in-person program-wide kickoff meeting to be held within five weeks of contract award. The REL shall bring three personnel, including the Director and Deputy Director, to meet in Washington, DC with the COR, CO, CS for the contract kick-off meeting. Within two weeks after the meeting, the REL shall submit a summary of the meeting discussions, including any outstanding issues raised and plans to address these issues.

Subtask 1.2 Communicate regularly with IES.

The REL – at a minimum, the Director and Deputy Director – shall participate in regularly scheduled (at least twice per month) meetings with the COR to discuss issues related to the REL contract, including any anticipated problems and proposed solutions to those problems, and update the COR on key milestones for REL projects. The REL shall send an agenda for the call at least two working days before each call so that both the REL and COR are aware of the main issues that will be addressed during the call. Within five working days following each meeting, the REL shall prepare a memo summarizing the key issues and concerns raised at the meeting and how each will be addressed.

The Director or Deputy Director shall communicate with the COR on a regular basis, such as by phone or email, to discuss urgent points and follow-up as needed.

Subtask 1.3 Attend biannual REL Program meetings.

The REL – specifically, the Director and one other key personnel²⁰ – shall attend two, one- to two-day REL Program meetings. Meetings may be in person in Washington DC, or virtual. The first REL Program meeting will be in person. The purpose of these meetings is to discuss issues and accomplishments related to the REL and the REL Program and consider ways to improve the functioning or outcomes of the REL Program. IES will coordinate the logistics for this REL Program meeting.

Subtask 1.4 Present REL portfolio annually to Department staff.

The REL shall present current and proposed work to REL Program and other invited IES and Department of Education staff in Washington, DC annually beginning in Year 2 of the contract. The purpose of the presentation is to ensure that other Department staff are aware of REL work and can discuss how this work connects or could potentially connect with other Department work. The REL shall submit briefing materials to the COR at least three weeks before the meeting. At least three REL staff shall plan on attending the one-day meeting. Within one week of each portfolio presentation, the REL shall submit a summary memo of items discussed at the meeting.

²⁰ The REL Director, Deputy Director, and task leads are considered key personnel for the REL contracts.

Subtask 1.5 Identify, establish, maintain, and convene the Governing Board.

The REL shall effectively manage all tasks with guidance from a statutorily required Governing Board, as specified in Section 174(h) of ESRA. The REL shall appoint members to the REL Governing Board to meet the following requirements:

- The composition of the REL Governing Board shall represent the interests of all states and other appropriate constituencies in the region.
- The REL shall offer every chief state school officer in the region the opportunity to serve on the REL Governing Board, or to designate a personal representative to serve.
- The composition of the REL Governing Board shall include a diversity of expertise and experience, including education researchers, educators, and individuals representing the interests of learners in economically disadvantaged areas, both rural and urban, and other underserved learners; see Section 174(h) of ESRA for additional information on the composition of the Governing Board.
- The REL Governing Board shall be separate from the REL's corporate board and shall meet on a different day from any corporate board meeting.
- The REL Governing Board shall convene at least two times each year, and these meetings may be held virtually or in-person. Additional meetings of the REL Governing Board may be conducted as needed. In-person meetings shall be at least one full day to allow ample time for the board to fulfill its duties. All in-person meetings shall be held at a location within the region.
- The REL shall ensure that members clearly understand the roles, responsibilities, and the procedures of the REL Governing Board. This includes ensuring that all REL Governing Board members are onboarded, and are kept informed of the work of the REL between meetings so that the REL Governing Board may maximize the time available during Board meetings to fulfill their responsibilities, including:
 - o Identifying and sharing the needs of the education constituency they represent with the REL.
 - O Providing strategic guidance on REL work and how the REL shall carry out its activities for maximum effectiveness and efficiency towards addressing regional needs and fulfilling intended outcomes, reduce unnecessary activities and/or activities redundant with other activities in the region, increase collaboration and resource sharing, and other activities as specified in Section 174(h) of ESRA. Governing Board members are expected to provide timely input and guidance on the needs and projects that impact the constituency they represent.
 - Leveraging their connections within the region to amplify products developed by RELs and the WWC to relevant stakeholders or organizations.

RELs shall provide Governing Board members the opportunity to provide meaningful input and guidance on projects that impact the constituency they represent, as those projects are being proposed and executed. Because the work of the REL will be proposed, approved, and executed on a rolling basis, biannual Governing Board meetings should not be the only opportunity Governing Board members have to provide such input and guidance. RELs are expected to communicate with their Governing Board members on a consistent basis to provide them the information they need to fulfill their duties in a timely manner.

²¹ "In-person" Governing Board meetings may be hybrid (in-person with an option to attend virtually) if necessary to improve attendance.

Within five weeks of the effective date of the contract, the REL shall submit to IES a report on the establishment of the REL Governing Board, board procedures, a list of members, and analysis of how the Governing Board meets the representational requirements.

The first REL Governing Board meeting shall be held within the first ten weeks of the contract effective date. After the initial meeting, meeting agendas shall be created in consultation with the Governing Board members at least 6 weeks before the Governing Board meeting occurs. The meeting agenda shall reflect a commitment by the REL to engage the Governing Board members actively in the decision-making of the REL. The agenda and meeting materials shall be submitted for approval by IES at least three weeks before each meeting. The REL shall submit to IES minutes, actions, and a discussion of how the REL will use Governing Board feedback to adjust their proposed or ongoing work within two weeks after each meeting.

RELs shall also keep their COR informed of potential additions to or resignations from their Governing Board. While the addition of new Governing Board members must be approved by current Governing Board members, RELs shall propose new Governing Board members to the COR in advance of proposing members to the Governing Board, and provide the COR with a justification as to why a potential Governing Board member is well situated to further the work of the REL.

Subtask 1.6 Submit a Bi-annual Assessment of Progress Report.

The Bi-annual Assessment of Progress will serve as a living document that provides the most up-to-date information about the REL's work. The Bi-annual Assessment of Progress should offer a retrospective review of the REL's work to date, with a short description of next steps if the partnerships or projects lend themselves to future work. RELs will not propose new work in the Bi-annual Assessment of Progress, as RELs are permitted and encouraged to propose new projects throughout the year as needs in the region arise.

The REL shall use the plan included in the contract proposal to inform the first Bi-Annual Assessment of Progress, with more guidance to follow post award. This initial report will not require an assessment of progress or lessons learned from collaborating and coordinating with partners. In subsequent submissions, each task will be updated. Tasks 1 and 2 will likely require minimal updates. The remainder of the Bi-Assessment of Progress will be organized by sets of projects in partnership and it shall include, but may not be limited to: (1) a description of approved and active partnerships; (2) the composition of each partnership; (3) a logic model and accompanying narrative that depicts and describes relationships between projects and their alignment to short-term, medium-term, and long-term outcomes of the partnership; (4) measurable targets for each outcome; (5) a measurement plan aligned to each outcome; and (6) an assessment of progress toward meeting partnerships' short-term and medium-term outcomes and targets, (7) lessons learned from collaborating and coordinating with partners; and (8) the names of partnership leads and principal investigators for research, training, coaching, and technical support projects. Any projects that are not associated with an approved partnership shall be organized by jurisdiction. RELs shall include information for non-partnership projects similar to what is required for the partnership projects, with the exception of the logic model requirements.

The first Bi-Annual Assessment of Progress is due within 14 weeks of the contract effective date. All subsequent Bi-Annual Assessments of Progress will be due every six months (each October and April) through April 2026. The COR will review and provide initial comments within three weeks of submission. The REL shall assume at least one round of revisions to the initial report and subsequent Bi-Annual Assessments of progress, with revised versions of the report to be submitted within two weeks of receiving COR feedback until the report is approved.

Subtask 1.7 Prepare and submit Monthly Progress Reports

The REL shall submit a Monthly Progress Report, due within 10 working days after the end of each month. The Monthly Progress Report shall include the following summaries:

- Major activities under each task and accomplishments—including any relevant data on progress towards partnerships' targets.
- Needs related to applied research or training, coaching, or technical support that have been identified by the REL through its interactions with regional stakeholders.
- Participation in cross-REL coordination activities.
- Coordination and collaboration with Comprehensive Centers, other Technical Assistance
 Providers, and other IES investments as well as referrals to other Department resources the REL
 has provided to stakeholders.
- Budget and expenditures for the period and cumulatively by Subtask, and by project under Tasks 4 and 5, with a clear identification of the extent of budget devoted to and resources spent on activities in rural areas. The budget and expenditure documents shall clearly indicate the labor hours spent on each Task and Subtask during the prior month and cumulatively since the project began by individual staff. In addition, under Tasks 4 and 5, the budget documents shall indicate the expenditures and labor hours spent for each project by individual staff during the prior month and cumulatively since the project began.
- Unexpected challenges, delays, or other issues that need to be addressed. If these delays result in revisions to the project timeline, RELs shall include a complete timeline for remaining project activities in the Monthly Progress Report.
- Major activities planned for the next month, including a schedule of deliverable submissions.

Subtask 1.8 Submit performance data relevant to the Department's strategic plan.

IES is required to submit an Annual Performance Plan (APP) with its annual Budget request to Congress. The APP identifies performance measures to accomplish the strategic objectives represented in the Department's <u>Strategic Plan</u>. The REL shall submit project-level data, up to five times a year, on performance measures identified by the COR. Specific reporting guidance will be provided by IES.

Subtask 1.9 Comply with IES' REL Employee Personnel Security Clearance Policy.

All REL positions will be designated as either a no-risk, low-risk or moderate-risk level. Within the first week of the contract start date the REL shall appoint a security liaison who shall submit a list of all staff on the contract with the appropriate position risk level designation. The REL security liaison shall submit the required documentation for all REL staff assigned a low or moderate risk to the IES security team within two weeks of contract start date, and as needed for REL staff added over the life of the contract. The security liaison shall be responsible for submitting the required documentation for staff from the prime contractor and any subcontractors. Additionally, REL staff shall complete periodic cybersecurity and records management training provided by IES. See *Appendix D: Records Management Obligations* for more information.

Subtask 1.10 Participate in REL Program Evaluation.

²² See Appendix F of the Instructions to Offerors for additional information on personnel security and clearance policy.

IES intends to conduct an independent evaluation of each REL and the REL Program itself. The REL shall cooperate with IES' requests for information and other types of assistance needed to conduct the evaluation. Information requests and assistance may include, for example, providing details about upcoming and past TCTS activities or facilitating the evaluation contractor's collection of data from REL partners. In addition, the REL shall plan to participate in two-day site visits from REL evaluation contractor staff in both Years 2 and 3 of the REL contract. Three REL staff shall participate in the two-day site visit, including both the Director and Deputy Director as well as one additional person to be determined in Year 2. The REL shall also be prepared to discuss with the REL evaluation contractor the feasibility of conducting a random controlled trial (RCT) or quasi-experimental design (QED) study of one of the REL's partnerships or projects. This discussion would occur in Year 2 of the REL contract and the RCT or QED would begin in Year 2 or Year 3 of the REL contract. The REL shall cooperate with the REL evaluation contractor in the implementation of this RCT or QED if such a study is deemed feasible.

Subtask 1.11 Prepare and submit final contract report.

Two months before the end of the period of performance, the REL shall submit a draft report that describes its key accomplishments and success in meeting targets established for partnerships' short-term, medium-term, and long-term outcomes of interest. For outcomes that are outside the timeframe of this contract, the REL shall provide information on their partners' plans to achieve these outcomes. IES will provide additional guidance on the specific format and content of the report. The final report is anticipated to be no more than 40 pages in length.

The COR will review the report and provide comments within four weeks. The REL shall incorporate the COR's comments for the final report. The final report shall be submitted two months before the end of the contract period.

Task 1 Deliverables

Table 1 provides a list of required deliverables for work conducted under Task 1, as well as their due dates. RELs and IES may negotiate on to add deliverables as appropriate.

Table 1: Task 1 Deliverables

Subtask	Deliverables	Due Date	
1.1	Summary of REL Kickoff Meeting	2 weeks after the kickoff meeting	
1.2	Communicate regularly with IES		
	Biweekly/Bimonthly call agenda	2 working days before each meeting	
	Biweekly/Bimonthly call summary memo	5 working days following each	
		meeting	
1.4	Present REL portfolio annually to Department staff		
	Department presentation briefing materials	3 weeks before each meeting	
	Summary of presentation to the Department	1 week after each meeting	
1.5	Identify, establish, maintain, and convene the Governing Board		
	Report on the establishment of the Governing	Within 5 weeks of the effective date of	
	Board	the contract	
	Meeting agendas and materials for Governing	3 weeks before the meeting	
	Board Meeting		
	Governing Board meeting minutes, action items and	2 weeks after each meeting	
	discussion of how the REL will use Governing		
	Board feedback to adjust their proposed or ongoing		
	work		

	Submission of proposed Governing Board members to fill vacancies	As needed
1.6	Bi-annual Assessment of Progress Report	Within 14 weeks of the effective date of the contract, the first working day of October and April through April 2026
1.7	Monthly Progress Report	Within 10 working days after the end of each month
1.8	Performance reporting	As requested
1.9	Submission of security documents for low- and moderate-level clearances	Within two weeks of the effective date of the contract, as needed
1.10	REL evaluation materials	As requested
1.11	Final contract report	Two months before the end of the period of performance

Task 2: Coordination and Collaboration

Individual RELs shall coordinate and collaborate with other RELs. Individual RELs should also coordinate with other U.S Department of Education-funded centers and technical assistance entities, including Research and Development (R&D) centers funded by IES and the regional and national Comprehensive Centers. The key purposes for this coordination and collaboration are to share and synthesize information, ideas, and lessons learned; to enable each type of provider to focus on its designated role; to ensure that work is non-duplicative; to streamline and simplify service provision to states and districts; and to collaborate on projects in order to better support regional stakeholders.

Subtask 2.1 Lead topically driven cross-REL coordination activities.

Each REL shall be responsible for developing, coordinating, reporting, and promoting REL activities on one non-overlapping topic in education ("leadership area") that has both regional and national importance. Work within this Subtask is intended to: (1) strengthen and leverage the knowledge and experience across the REL Program on a topic, (2) increase collaboration and coordination across all RELs, and (3) generate Task 4, Task 5, and Task 6 products that benefit the REL Program, REL partners and education stakeholders broadly.

After contract award, IES will identify one leadership area for each REL. After being assigned a leadership area topic, the REL shall lead the design and execution of activities like those described below. All cross-REL activities or products for a REL's leadership area shall be proposed to and approved by their COR.

RELs may be asked to present cross-REL activities or products from their leadership topic to program offices within the Department, including and beyond NCEE, at IES's office in Washington, DC up to two times over the course of this contract; such activities shall also be covered under this Subtask.

Cross-REL working group meetings

Cross-REL working group leads are responsible for scheduling and coordinating quarterly working group meetings to accomplish the goals of this Subtask. Discussion topics shall include but are not limited to discussing potential or ongoing joint cross-REL projects, understanding and documenting related work from each REL, and sharing REL or extant resources or approaches related to the topic area.

To develop shared knowledge across the program, working group leads may also plan cross-REL activities intended for REL-only audiences, including but not limited to staff participating in the working

group. Examples include but are not limited to workshops on current evidence-based research presented by an expert in the field, conversations on dissemination and engagement strategies, or discussions about research methods common in applied research on the topic the REL is responsible for under this Subtask.

Working group meetings or REL-only activities can occur virtually or in person; however, in-person meetings or REL-only activities may only be proposed if they coincide with an event that REL staff are already attending.

All activities under this Subtask shall be outlined in the Bi-annual Assessment of Progress and reported on in the Monthly Progress Report.

Required external cross-REL activities or products

Within the first 18 months of the REL contract, each working group shall develop a brief, public-facing product such as a fact sheet or brief memo providing an overview of the topic that includes relevant REL and non-REL research and technical support products.

In *either* Year 2 or Year 3 of the REL contract, each working group shall develop a public-facing product or at least one activity that highlights and/or synthesizes the work that RELs are doing across the program around the given topic area. These can also include non-REL research.

Examples include, but are not limited to: a coordinated series of dissemination activities (e.g., a series of newsletters or infographics), a topical webinar series that highlights and/or synthesizes both REL and non-REL research, a cross-REL presentation at a conference, or a cross-REL event.

In *either* Year 4 or Year 5 of the REL contract, each working group shall create a public-facing product that highlights REL work in a given topical area. The product can also include peer- reviewed non-REL research relevant to the topical area. Once completed, each working group shall deliver, record, and archive a presentation on the product. Potential venues include national practitioner conferences, presentations at the Department, or other sites identified in consultation with the REL COR.

Optional external cross-REL activities or products

In addition, RELs may, but are not required to, jointly develop an original cross-REL activity or product. Unlike the synthesis activities mentioned above, these projects are new activities such as a joint research study, tool, or TCTS project. These activities or product ideas can be formulated under this Subtask but shall be proposed and developed under the associated Task.

Subtask 2.2 Participate in cross-REL coordination activities.

Each REL must designate at least one person to be an active participant in each of the cross-REL leadership groups they do not lead. Participants are expected to regularly attend cross-REL meetings, be able to speak on behalf of their REL about the work occurring under the topic area, if there is any, and support the development of cross-REL products and activities. The REL shall report a summary of these activities monthly as part of the Monthly Progress Report.

Subtask 2.3 Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments.

The REL shall identify opportunities for coordination, collaboration, and dissemination with other IES funded activities and other federal and local technical assistance providers. The REL shall not duplicate the information gathered or services provided by other federal or non-federal technical assistance

providers. The REL shall refer stakeholders to other available resources when the stakeholders' needs are outside the scope of REL Program or when the needs can be more effectively met by others.

Regional Comprehensive Centers

In a joint effort with the Office of Elementary and Secondary Education's (OESE's) Comprehensive Center Program, the REL shall coordinate and collaborate with each of their regional Comprehensive Center counterpart(s) in their region in order to ensure the work of the REL contributes to the development and implementation of a cohesive and potentially deep body of knowledge nationally as well as in each region, avoids duplicating efforts across programs, and streamlines and simplifies the process of receiving federal technical support from the stakeholder perspective.

RELs and their regional Comprehensive Center counterpart(s) shall establish regular meetings, to occur at least quarterly across the entirety of the contract period, to ensure continuous coordination and potential collaboration. Discussions in these meetings shall address topics such as any new needs that arise, any changes occurring within a state (e.g., new leadership or new policies), updates on ongoing or potential projects, and identifying any collaboration opportunities. These regular meetings can also cover planning for any collaborative projects—to be proposed under the associated REL task.

Within the first 90 days of the contract, the REL and each regional Comprehensive Center within the REL's region shall develop and sign a letter of intent that outlines how the programs will meet the coordination and collaboration requirements. This letter of intent shall be updated annually, as needed.

At least once per year, the REL and its regional Comprehensive Center counterpart(s) shall engage in a joint in-person (when possible) need-sensing activity with State Education Agency (SEA) chiefs or their designees (or similar level for Washington D.C, U.S. territories and Freely Associated States) with each jurisdiction they jointly serve. These in-person meetings will allow both programs to jointly understand the high leverage needs in the state, to determine how each program can potentially address the states' needs, and to more seamlessly coordinate any potential cross-program support. In March of Year 2 through Year 5, RELs shall develop an annual memo outlining the findings from the REL and Regional Comprehensive Center's previous year of needs-sensing activities by jurisdiction, and actions RELs and regional Comprehensive Centers are taking or plan to take to address identified needs.

All coordination and collaboration shall be outlined in the Bi-annual Assessment of Progress and reported on in the Monthly Progress Report.

Other Technical Assistance Providers and IES Investments

The REL shall establish formal or informal structures to maintain a clear, thorough, and up-to-date knowledge of the work occurring in the network of organizations that provide different forms of research assistance to stakeholders. This network shall include other IES investments such as the WWC, research projects funded by the National Center for Education Research (NCER) and the National Center for Special Education Research (NCSER), National Center for Education Statistics (NCES) programs, such as the National Forum on Education Statistics, as well as other federal, local, and professional organizations that provide educational services to state, local education, and postsecondary agencies that align with the outcomes of REL partnerships.

Structures can include informal or formal meetings with other providers, IES contractors, or grantees in order to discuss any relevant needs-sensing, any research or activities occurring in each respective program, and any coordinated dissemination opportunities. At a minimum, internal structures shall be developed by the REL to allow the REL to identify research or other products and supports developed by

all relevant networks. Strategies shall be developed for helping stakeholders make effective connections with these other services to avoid duplicative efforts.

All coordination and collaboration shall be outlined in the Bi-annual Assessment of Progress and reported in the Monthly Progress Report, which shall include a summary of the collaboration and referrals that have been made each month.

Task 2 Deliverables

Table 2 provides a list of required deliverables for work conducted under Task 2, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

Table 2: Deliverables under Task 2

Subtask	Deliverables	Due Date		
2.1	Lead cross-REL coordination activities			
	Cross-REL meeting agenda and materials	2 weeks before the meeting		
	Cross-REL meeting summary	2 weeks after the meeting		
	Proposal for Cross-REL, REL-only event	As needed		
	Agenda and materials for cross-REL, REL-only event	3 weeks before event		
	Summary of cross-REL, REL-only event	2 weeks after the event		
2.1	Cross-REL infographic or newsletter			
	Proposal (infographic only)	As needed		
	Infographic or newsletter	As proposed		
2.1		Cross-REL webinar		
	Proposal	As needed		
	Materials and agenda	3 weeks before the webinar		
	Summary of Stakeholder Feedback Survey results	2 weeks after the webinar		
	Event summary	2 weeks after the activity		
	Event recording	2 weeks after the activity		
2.1	Cross-REL video			
	Proposal	As needed		
	Script and story board	As proposed		
	Video	As proposed		
2.1	Cross-REL conference presentation			
	Proposal	As needed		
	Agenda and materials	3 weeks before the		
	5	presentation		
	Summary of conference presentation	2 weeks after the presentation		
	Summary of Stakeholder Feedback Survey results	2 weeks after the presentation		
2.1 Presentation to the Department				
	Agenda and materials	3 weeks before the		
	5	presentation		
	Summary of presentation to the Department	2 weeks after the presentation		
2.3	Coordinate and collaborate with regional Comprehensive Centers, other Department			
	technical assistance providers, and IES investments			
	Signed letter(s) of intent with each regional	Within 90 days of the effective		
	Comprehensive Center in REL region	date of the contract, updated as		
		needed in contract years 2 – 5		
	Joint needs sensing summary memo	Annual, no later than March		
		31st in contract years 2 – 5		

Task 3: Working in Partnership with Stakeholders

A primary goal of the REL Program is to improve outcomes for learners through increasing the generation and use of research evidence in education practice and decision making. To achieve this goal, the REL shall develop and conduct all applied research, training, coaching, and technical support work in partnership with the stakeholders the work is intended to serve.

Subtask 3.1 Conduct needs-sensing and develop partnerships.

Throughout the duration of the contract, the REL shall engage in needs-sensing through communication with stakeholders in its region and secondary information sources such as state or district websites.

As described in the *Expectations for the Implementation of the REL Program* section, all REL work shall be planned and conducted in partnership and shall be informed by those partners' needs and desired outcomes. Additionally, RELs shall seek opportunities to engage students, parents, and community stakeholders from historically underserved groups when possible to identify and address issues related to educational equity. RELs may convene new partnerships or join established stakeholder groups. All materials developed for needs-sensing meetings with potential partners shall be submitted to the COR at least two weeks before each meeting.

For any partnering group for which more than one project across Task 4 and/or Task 5 is planned, or any group for which one Task 4 or Task 5 project is planned that will last six months or longer, the REL shall submit a partnership proposal alongside the concept paper²³ for the first project with this partnership. The partnership proposal will describe the overall focus of the work, the specific high-leverage need the work will address, an overview of how the need will be addressed through the REL's support, relevant context such as existing efforts outside the REL to address the need, and the individual members that will participate. Partnership proposals must include a letter of support from each organization that will participate to indicate that the approach is feasible and will meet their needs. RELs shall report on identified regional needs, including the source used to identify each need as part of their Monthly Progress Report.

Although partnership proposals are required under the conditions set forth in the previous paragraph, please note that once a REL establishes a partnership with a group of stakeholders, the partnership is not required to continue for the entirety of the five year contract cycle²⁴. Further, RELs are not required to

²³ A concept paper is a short (no more than five pages, single-spaced) document that serves as a high-level overview of proposed work. Concept papers must be approved by the COR before RELs invest the resources to develop a full proposal for a TCTS or applied research and development project. Concept papers typically include information on the high-leverage need to be addressed, scope of work, audience of the work, explanation of how the proposed work will support a partner's short-, medium-, and long- term targets, and a preliminary timeline and budget that can be updated in a full proposal.

²⁴ RELs may propose a limited number of "one-off" projects provided they demonstrate that they are high-leverage. Additionally, RELs may propose sets of projects in a partnership proposal that will last longer than 6 months but not the entirety of the REL contract.

propose a fully fleshed out set of projects when they begin work on an initial project with partners. IES expects that some partners will wish to begin work in partnership with a REL with a single, small-scope project. As such, RELs may submit partnership proposals once it is clear that the work done in partnership with a set of stakeholders will meet the criteria for a partnership proposal, even if work on a single project has already been approved to begin.

Once a partnership proposal is approved, the REL shall develop a partnership-level logic model (or equivalent) that outlines how the proposed activities done in partnership will lead to the attainment of the intended outcomes. Each logic model shall describe each of the applied research, training, coaching, and technical support projects the REL intends to undertake in partnership; the intended outputs; short-, medium-, and long-term outcomes of the work; and the intended, measurable, time-bound targets for each outcome. In order to assess the REL's progress toward the outcomes identified in the logic models and their associated targets, the REL shall also develop a measurement plan to determine progress toward and achievement of each target associated with a logic model outcome. IES expects that RELs will collect data related to measuring progress towards specific targets as often as is needed to determine whether they are being met, for example through Stakeholder Feedback Surveys (SFS) after dissemination or TCTS activities are completed (RELs may also use other data sources, including extant data or data the REL collects outside of the SFS). ²⁵ IES expects the process of developing a partnership- level logic model and measurement plan with partners to be brief – measured in weeks, not months – in order to maximize the time stakeholders have available to complete the work.

Subtask 3.2 Maintain partnerships established under Subtask 3.1.

RELs shall continue to conduct ongoing needs-sensing with partners, convene meetings with partners that are not specific to a single ongoing project²⁶, and regularly communicate with the partners in order to progress the work toward the intended outcomes and associated targets under this Subtask. All materials developed for meetings with partners under this Subtask shall be submitted to the COR at least two weeks before each meeting. RELs shall summarize these meetings through their regular bi-monthly or bi-weekly calls with CORs and through their Monthly Progress Report.

The logic models and associated measurement plans developed under Subtask 3.1 are to be considered living documents that change as conditions warrant. RELs should use these logic models as one tool to keep their current and future work focused on the outcomes, or to document new outcomes as necessary. The logic models and measurement plans shall be reviewed with partners, updated, and submitted to the COR biannually at a minimum through Bi- annual Progress Assessments. However, efforts towards maintaining or updating partnership- level logic models and measurement plans should be included under this Subtask.

The REL shall also administer a partnership-level SFS to all partners on an annual basis.

Subtask 3.3 Establish and maintain communities of practice (not required).

²⁵ IES requires that RELs administer a Stakeholder Feedback Survey (SFS) annually to partners, and to participants of Task 6 dissemination activities and Task 4 TCTS activities at the end of the activity. When possible, RELs shall also administer a follow-up SFS to participants of TCTS activities at least 6 months after the conclusion of the activity. The purpose of the SFS is to inform future projects and measure stakeholders progress towards their intended outcomes. IES will provide RELs with a menu of SFS questions to select from based on the specifics of that project; RELs will not be expected to develop their own SFS questions.

²⁶ Meetings that are specific to a single project under Task 4 or Task 5 should be included in the budget for that project.

If a REL 1) is working in partnership with separate groups of partners within or across states that are focused on similar or related topics; and 2) determines that these groups would benefit from learning or working together, the REL may, but is in no way required to, propose one or more communities of practice (COP). The proposal should justify the size, scope, and high-leverage topic of the COP. The primary purpose of a COP should be to facilitate sharing of information, ideas, lessons learned, etc. among members through periodic meetings. While most of the REL's work should be developed and conducted to serve their partners' specific needs, some limited TCTS, applied research, or tool development work may also be conducted with multiple partners under the appropriate Task, facilitated through a COP. As with all proposed work, this will require the REL to demonstrate to IES that the work meets the criteria of "high-leverage."

Once a COP is established, RELs shall conduct ongoing needs-sensing, convene COP meetings, and regularly communicate with COP members in order to serve its members' needs. COP meetings should be summarized during the REL's regular check-in calls with their COR, and through their Monthly Progress Report. Once established, a COP need not be maintained throughout the duration of the contract period. Its focus may shift, or it may be discontinued if COP members determine that the COP is no longer needed.

Task 3 Deliverables

Table 3 provides a list of required deliverables for work conducted under Task 3, as well as their due dates. RELs and IES may negotiate to add deliverables as appropriate.

Table 3: Deliverables under Task 3

Subtask	Deliverables	Due Date	
3.1	Conduct needs-sensing and develop partnerships		
	Partnership proposal	As needed	
	Needs-sensing meeting materials	As needed; 2 weeks before meeting	
	Maintain partnerships developed under Subtask 3.1		
3.2	Partner planning meeting materials	As needed; 2 weeks before meeting	
	Stakeholder Feedback Survey of partners	November 30 th of each contract year	
3.3 Establish and maintain communities of practice (not required)		·	
	Community of practice proposal	As needed	
	Community of practice meeting materials	As needed; 2 weeks before	
		meeting	

Task 4: Training, Coaching, and Technical Support (TCTS) for Evidence Use

The REL Program's training, coaching, and technical support (TCTS) projects and activities leverage RELs' unique expertise in designing and interpreting rigorous research, as well as the identification and application of evidence-based practices. Under this task, RELs shall identify, develop, and implement TCTS projects and activities that incorporate, build, and support partners' individual and organizational knowledge and capacities in service of addressing high leverage issues within the REL region. TCTS

projects and activities shall be co-developed with partners, be more intensive than activities under other tasks such as Dissemination, and incorporate partners' specific contexts within their design. To the greatest degree possible, TCTS should be embedded within recipients' settings and their existing structures for determining and implementing policies or practices. Whenever feasible, RELs should also incorporate the perspectives and needs of student, parent, and community-based partners when developing and executing TCTS projects.

IES expects RELs to use TCTS projects to supplement and support projects under the *Applied Research* and *Peer Reviewed Research-based Development Projects Task* (Task 5) where appropriate. Blending supports across tasks maximizes the chances of the work achieving its short-, medium-, and long-term outcomes. For example, TCTS projects can occur before or during an applied research project to help partners understand existing evidence or collect more detailed, local data to support a research project on the high leverage topic of interest. TCTS projects may also occur after an applied research project is completed with the goal of exploring implications of the research and potential next steps towards meeting partners intended outcomes.

Subtask 4.1 TCTS Projects

Training

RELs are uniquely suited among the Department's technical support network to provide intensive training that increases the individual and organizational capacity of partners and/or stakeholders to effectively apply research evidence to practice and supports partners in identifying and fulfilling next steps to achieve their short-, medium- and long-term outcomes. Training activities involve hands-on, direct guidance or instruction from experts in research or practice. Examples of training activities include, but are not limited to, virtual trainings for administrators or teacher leaders on applying recommendations from a WWC Practice Guide or other rigorous extant research to professional development, in-person trainings for state-level staff on promising school turnaround practices, or training staff from partner organizations in the effective distillation and communication of research evidence on a specific high leverage topic.

Coaching

RELs are also uniquely suited to provide *coaching* that supports decisionmakers in applying research evidence to inform high-leverage decisions and actions. Coaching in this context is akin to being a "thought partner" or "critical friend" to individual partner organizations or a small group of individuals representing multiple partner organizations during the process of making decisions related to policy or practice. For example, coaching support can entail co-developing materials or other outputs with partners to encourage and support evidence-informed, partner- driven changes to policy or practice. Coaching supports partners' decision-making through ongoing sessions covering research evidence or current practice related to a specific topic.

Technical Support

RELs' expertise also makes them well-situated to provide *technical support* to build partners' capacities to perform research-related activities such as identifying, collecting, analyzing and visualizing data. Examples might include, but are not limited to (1) providing support to a research office within a partner SEA or LEA to help that office identify existing data and/or collect new data necessary for an evaluation of an existing program, (2) providing support to a research office within a partner SEA or LEA to help

that office perform data analyses on a topic, or (3) supporting a partner LEA or SEA in designing a study to inform or support its implementation or a local adaptation of a evidence-based practice or policy.²⁷

As with all REL activities, technical support should be targeted in service of partners achieving their desired outcomes in high-leverage areas. Technical support with the intent of general capacity building, absent a specific high-leverage outcome is not an efficient or appropriate use of REL funds.

TCTS Proposals and Projects

As needed, the REL shall develop concept papers and proposals, and once approved, conduct TCTS activities. TCTS activities may be proposed on a rolling basis throughout the contract, provided there is sufficient time to complete the work before the end of the contract period of performance. All concept papers and proposals will be reviewed and approved by the COR. Concept papers and proposals for TCTS activities shall identify partners by organization/office (if applicable), and the nature of their participation shall be described. When proposing a TCTS project, RELs shall describe how the activity or activities that comprise the project will help facilitate partners' desired short-, medium-, and long-term outcomes. Projects whose content and design is not anchored by partners' outcomes are unlikely to meet the criteria of high leverage. As part of a project's design, RELs shall collect or help partners identify and collect information necessary to determine whether the outcomes and associated targets for the project were met. All TCTS project proposals shall include a realistic and feasible timeline for completion within the contract period. TCTS proposals shall also include the proposed labor hours and costs for the project.

TCTS activities and related materials shall be informed by the highest quality, most rigorous available research. RELs shall emphasize the extent and quality of existing research on the topic of interest within all TCTS activities. When designing and proposing TCTS projects, IES expects RELs to think deeply about both the content and the design of their support. RELs should draw on research on effective professional development, capacity-building support, and adult learning theory as well as develop and assess new structures of support in order to meet their partner's needs. For example, research and literature points to the importance of stakeholders learning in the contexts in which they work (Elmore, 2004²⁹; Pfeffer and Sutton, 2000³⁰) and engaging stakeholders in activities that allow them to think critically about new knowledge (Yarbrough, 2018³¹). If a medium-term goal of the project is for recipients of TCTS to apply knowledge learned to their practice, RELs should seek to embed their support in TCTS recipients' actual setting or a similar context and provide critical thinking opportunities.

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²⁷ All *applied research* shall be performed under Task 5. However, RELs may work together with partners under this task to help develop code and/or co-analyze data for the sole purpose of building partner capacity to do such analyses independently. These types of technical support activities must be scaffolded. They may not consist of a REL analyzing data on its own and providing results to partners absent any capacity-building activities.

²⁸ See Task 3 (Working in Partnership with Stakeholders) of the Scope of Work for a description of a concept paper. Concept papers must be approved by the COR before RELs invest the resources to develop a full proposal for a TCTS project.

²⁹ Elmore, R. (2004). School reform from the inside out: policy, practice, and performance. Cambridge, MA: Harvard Education Press.

³⁰ Pfeffer, J. & Sutton, R. The Knowing-Doing Gap: How Smart Companies Turn Knowledge into Action. Boston, Mass: Harvard Business School Press.

³¹ Yarbrough, J. (2018). <u>Adapting Adult Learning Theory to Support Innovative, Advanced, Online Learning – WVMD Model</u>. *Research in Higher Education Journal, 35.*

Quality Assurance for TCTS Activities and Projects

TCTS project teams shall include content experts who have made meaningful contributions in a field relevant to the TCTS activity, either through authoring published research or practitioner guidance. TCTS project design and materials should also be internally reviewed by experts in adult learning or professional development. In cases when RELs and their partners are conducting TCTS activities directly with educators, the RELs are encouraged to have at least one representative of the target audience codevelop or provide an internal review of the TCTS proposal and materials before submission to IES in order to maximize relevance, usability and actionability. This individual may be a current or former educator and may be REL staff. The REL shall also ensure that project teams include personnel with appropriate cultural understanding, content knowledge, and methodological expertise to conduct careful reviews of proposals and products before submission to the COR. In addition, the REL shall ensure that all products receive extensive editorial attention with an emphasis on plain language.

In addition to the internal quality assurance procedures listed above, the REL shall propose an external subject matter expert (SME) for every TCTS project with a short-term goal of increasing stakeholder capacity to understand the extant research literature on a high leverage topic. The sole role of the SME will be to advise the project team on the design and content of evidence based TCTS activities and products. The SME must be external to the project. That is, a SME cannot work on the project (or set of closely related projects) for which they act as a SME in any other capacity. The SME may be internal or external to the prime contractor so long as she or he meets the above criteria.

The REL may propose SMEs on a project-by-project basis, or submit a running list of proposed SMEs, along with their affiliations, backgrounds, areas of expertise, and a resume or CV for pre- approval by IES. Regardless, RELs must propose a SME and provide documentation of the SME's substantive expertise relevant to the project for approval before submitting a full proposal. The REL shall also submit a memo along with the first draft of proposals or relevant project materials outlining 1) the SME's feedback on internal drafts of proposals or materials; and 2) the REL's response to the SME's feedback.

Sharing TCTS materials

RELs are encouraged to submit TCTS materials for posting on the REL website, with the understanding that materials that are very specific to a partner and/or their context may not be actionable within other contexts, and thus may not add value to a wide audience if posted. RELs shall discuss with IES which TCTS materials they anticipate will add value in posting on the REL website; however, IES will ultimately decide which materials are posted. RELs are also encouraged to consider whether any TCTS materials they develop may be widely useful if slightly modified to be less specific to a partner's context. IES expects that RELs will adapt materials to a more general context and share through the REL's website in cases where such materials are likely to be widely useful and utilized.

Subtask 4.2 Implement an "Ask an Expert" Service

RELs shall develop and implement an "Ask an Expert" service to provide real-time methodological expertise and evidence-based thought partnering to key stakeholders within their region. "Ask an Expert" services should be limited to addressing questions that can be answered succinctly using evidence-based subject matter expertise, or expertise in designing and performing research studies. Requests related to interpretation or implementation of a policy or practice, requests where there is no directly relevant extant research to guide expert responses, requests for discussions with or presentations to a large (more than five) group of stakeholders, or requests that would require more than two meetings with the requestor to

fulfill the request may not be addressed through this service and may be better fulfilled through a different REL task, or outside of the REL Program.

IES expects that "Ask an Expert" services will not be as intensive as TCTS under Subtask 4.1. Ask an Expert services are intended to provide quick turnaround support. This Subtask may only be used for requests from key stakeholders that can be addressed within one month of receiving the request. Additionally, RELs may not use the "Ask an Expert" service to produce products typically developed under Tasks 5 or 6.

Within eight weeks of the effective date of the contract, the REL shall submit a memo to IES that outlines how the "Ask an Expert" service will be implemented. This memo must be approved by IES in advance of the REL implementing the "Ask an Expert" service. This memo should outline several aspects of their "Ask an Expert" service, including:

- A systematic internal process for determining if a request is best addressed through the "Ask an Expert" service, another REL task, or another federal service provider. For example, a request for an annotated bibliography or research references related to an education question may be referred to the <u>ERIC Helpdesk</u> or <u>National Library of Education</u>. If a REL does not possess the requisite expertise or resources to answer a request either through the "Ask an Expert" service or another REL activity or the request does not fall within the scope of the REL Program, they may instead refer the requestor to another federal service provider, or to experts external to the REL in lieu of answering the question.
- A process for "Ask an Expert" requests to be received and responded to on a rolling basis.
- A process for identifying an appropriate respondent to "Ask an Expert" requests and proposing respondents for IES approval. RELs may use SMEs in this role when their expertise is relevant to the request and/or propose experts to their COR on a rolling basis.
- A close-out process for "Ask an Expert" requests. This should include development of a short summary memo of each meeting with an "Ask an Expert" requestor, to be shared with both the requestor and IES within five working days of the meeting. This should also include a process to determine whether follow-up supports are necessary. Follow-up supports may entail additional REL activities or referrals to other organizations.

IES expects that RELs will not use this service to generate additional business for their organization or their subcontractors. IES also expects that most, if not all, meetings with requestors will be done virtually. RELs may not invoice travel costs against this Subtask.

Task 4 Deliverables

Table 4 provides a list of deliverables for TCTS projects under this task, as well as their due dates. Projects may (and often do) involve multiple training or coaching sessions. In such cases, RELs shall submit agendas and presentation materials to IES at least two weeks prior to each session. RELs shall also administer a Stakeholder Feedback Survey at the end of the project to all individuals who attend TCTS activities and submit the results of the survey to the COR.

Table 4 provides a list of required deliverables for work conducted under Task 4, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

Table 4: Deliverables under Task 4

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Subtask	Deliverables	Due Date
4.1	TCTS Projects	
	Concept paper for virtual or in-person training, coaching, or	As needed
	technical support project	
	Proposal for virtual or in-person training, coaching, or	As needed
	technical support project	
	Materials and agenda for TCTS session	2 weeks before each session
	Stakeholder Feedback Survey results	2 weeks after the end of the project (or included in the next monthly progress report), with follow up at 6 least months after the end of the project.
4.2	"Implement an Ask an Expert" Service	
	Memo outlining how the "Ask an Expert" service will be	Within 8 weeks of the effective
	implemented	date of the contract
	Memo summarizing "Ask an Expert" meeting	5 working days after each meeting with the requestor

Task 5: Applied Research and Peer Reviewed Research-based Development Projects

The purpose of the Applied Research and Development task is to (1) conduct applied research and report relevant findings, and (2) to develop products, subject to peer review, that are based in rigorous research be it original or extant. For the purposes of this task, "products" include reports, PowerPoint presentations under Subtasks 5.1 and 5.6 (not required), toolkits that support the instantiation of existing evidence-based practice under Subtask 5.2, documentation and materials for the design and testing of new programs under Subtask 5.3 (not required), and additional tools under Subtask 5.4 (also not required). At state and local partners' request, products may also include any materials that result from conducting assessments of research study quality under Subtask 5.5.

All REL work under this task shall be co-developed with partners to support change processes that address localized, high-leverage problems. RELs shall describe in concept papers (when required) and project proposals how all Task 5 projects will help facilitate the key partners' desired short-, medium-, and long-term outcomes. As described in the *Expectations for the Implementation of the REL Program*, IES encourages RELs to propose Task 5 projects that have the explicit goal of addressing educational equity.

Although this work is listed as a separate task, it is essential that the REL work in partnership with stakeholders and collaborators to develop a cohesive set of activities. For example, the publication of a research report should never be a standalone event. Applied research, combined with dissemination, and TCTS supports before, during, and after report publication are more likely to lead to the fulfillment of the partnership's desired outcomes than a single applied research report without accompanying activities.

Subtask 5.1 Conduct original applied research and report findings.

All research projects undertaken by RELs shall include a strong justification for the relevance and rigor of the proposed work. Applied research shall be designed to both inform short-term, high-leverage policy decisions and help build knowledge towards future decisions by practitioners or policymakers related to

³² See Task 3 (Working in Partnership with Stakeholders) for a description of a concept paper.

education policy or practice. The audience for all research projects must be clear, specific, and appropriate with respect to the intended outcomes of the project.

Develop Research Proposals

Applied research may be proposed on a rolling basis throughout the contract, provided there is sufficient time to complete the work before the end of the contract period of performance.

Proposals for research studies shall identify partners by organization/office, and the nature of their participation shall be described. All research projects shall include a realistic and feasible timeline for completion within the contract period. All applied research projects shall be completed in time to allow RELs to support partners' and stakeholders' understanding and application of findings by providing at least one briefing for key stakeholders. The briefing should be included as a Task 5 milestone. IES encourages RELs to propose a separate TCTS project if partners and key stakeholders need additional support related to the research project. Applied research proposals shall also include the proposed labor hours and costs for the project.

The REL shall develop concept papers and proposals, and once approved, conduct research projects leading to published products. All proposals will be reviewed by the COR, peer reviewed by the REL peer-review contractor, and approved by the NCEE Associate Commissioner.

Documentation for Applied Research Projects

REL research projects are subject to the IES Public Access Policy. ³³ Causal studies that collect original outcome data are required to have Data Management Plans³⁴ that must be submitted with the proposal. Once this type of applied research proposal is approved by IES, it must be registered in the Registry of Efficacy and Effectiveness Studies. ³⁵ All peer-reviewed work where the Special Rights and Data clause is waived ³⁶, such as to allow RELs to publish in a journal, is subject to the IES Public Access Policy for Publications. ³⁷

Additionally, the REL is responsible for ensuring that each study has the appropriate Institutional Review Board (IRB) approval. The REL shall submit documentation of IRB approval to IES as soon as possible after IES has conditionally approved the study proposal.³⁸ The REL shall not begin data collection or analysis until IES confirms with the REL that all IRB requirements have been met.

In any case in which the REL plans to recruit or collect the same data from more than 9 sources, the REL shall prepare a clearance package for IES and OMB Information Collection Review that lists the potential study participants, describes the study design and data collection instruments, and includes the necessary forms required for OMB approval. The REL shall submit the OMB clearance package to IES within one week after IES has approved the study proposal. The REL may not begin recruitment or data collection until OMB has approved the package.

³³ https://ies.ed.gov/funding/researchaccess.asp

³⁴ https://ies.ed.gov/funding/datasharing policy.asp (also applies to contracts)

³⁵ https://sreereg.icpsr.umich.edu/

³⁶ Please note that IES very rarely waives the Special Rights and Data clause; offerors should not assume this will be done for any proposed project.

³⁷ https://ies.ed.gov/funding/datasharing grants.asp

³⁸ See figure E.1 in appendix E of the Instructions to Offerors for more information on conditional approval of research proposals.

RELs shall submit all documentation for applied research projects to their COR for approval.

Reporting Applied Research Findings

RELs shall propose a reporting format that will best meet the needs of stakeholders and partners. RELs may propose a traditional report format. In this case, RELs shall prepare a report of up to 15 pages and either a one-page or a four-page summary. Traditional research reports shall meet the description, requirements, and formats described in the REL Program Writers and Style Guide. Appendices shall be published in a separate document that will not count towards the 15-page limit. Research reports must be clear and engaging, with appropriate brevity.

RELs and their partners may also propose a PowerPoint slide deck, a single or series of infographics, or other non-traditional format for sharing study results with partners and decisionmakers.³⁹ In this instance, RELs shall submit the final product along with a supporting memo that provides detailed documentation of the research study's methodology, including data and limitations. All research products will be reviewed by the COR, peer reviewed by the REL peer-review contractor (RPR), and approved by the NCEE Associate Commissioner and NCEE Commissioner. All products will be submitted to the Office of the Secretary and then posted on the IES website as 508-compliant files. RELs must explain in the research proposal why a non-traditional format is optimal for reporting the findings of the proposed research.

Optional White Paper Publications. In the event partners or key stakeholders need to use research study findings to make a high-leverage decision before a report can be published by IES through the typical publication process, IES may publish a white paper version of the report at the end of Phase I review. (See Figure E2 in Appendix E of the Instructions to Offerors for information on of Phase I and Phase II of review process.) White papers serve as interim reports, which will be submitted to the Office of the Secretary and then published on the REL website and indexed in ERIC. The REL is responsible for submitting a 508c version of the report to publish on the IES website. The report will also continue through Phase II review and both the final report and the white paper will be posted on the same publication page. RELs will need COR approval in advance to access the white paper publication option for a report.

Subtask 5.2 Develop a toolkit based on WWC Practice Guides to support educators use of evidence-based practices

IES is invested in developing practitioner-friendly toolkits to help educators use evidence-based practices in classrooms – from preschool through postsecondary settings. Some of the best evidence available is consolidated in the WWC Practice Guides, in which researchers and practitioners review the evidence from the most rigorous studies available, develop recommendations for practice, and create action steps for how to use the recommended practices.

To help get this evidence into the hands of stakeholders, RELs shall partner with educators and postsecondary instructors (if relevant) to develop one toolkit based on an assigned WWC Practice Guide, which shall include all materials necessary for effective implementation. ⁴⁰ RELs may choose to include

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³⁹ One exception to this rule is the evaluation of a toolkit developed under Subtask 5.2 or an intervention developed under Subtask 5.3. Evaluations of these products must be shared through a traditional 15-page report and one-page summary.

⁴⁰ Some Practice Guides present a set of recommendations in which all recommendations should be implemented to achieve the intended outcomes while other Practice Guide recommendations may be implemented

one or more recommendations from a WWC Practice Guide in the toolkit, but RELs may not change the language of the recommendation.

Toolkit Components

A toolkit must contain the following three parts:

- 1. Initial Diagnostic and On-going Monitoring Instruments: This should include at least two types of instruments that can be used for the collection of initial, diagnostic data and for the collection of ongoing monitoring data: (A) a comprehensive measurement tool such as an observation rubric or checklist that enables an educator or postsecondary instructor to assess their current/baseline practice and future practice against the practices recommended in the WWC Practice Guide; and (B) a comprehensive diagnostic that enables educators, postsecondary instructors and leaders to assess the extent to which their school and/or district support the implementation and on-going monitoring of the research-based Practice Guide recommendations included in the toolkit. RELs can use previously developed instruments or develop new ones as part of the toolkit.
- 2. **Professional Development Resources:** A comprehensive set of resources that help an educator or a community of educators to acquire the knowledge and skills associated with the WWC Practice Guide recommendations and to implement the Practice Guide recommendations with fidelity in a sustained fashion.

Professional development resources might include guidebooks, workbooks, professional learning community guides, self-study guides, videos that demonstrate a practice being implemented with fidelity in a classroom, practice audits, rubrics, and more. Offerors are expected to take account of potential roadblocks and solutions identified in the Practice Guide when developing resources. Examples of Professional Development Resources can be found among tools that RELs have already developed such as the following Professional Learning Community (PLC) Facilitators Guides:

- <u>Professional Learning Community: Improving Mathematical Problem Solving for Students in Grades 4 Through 8 Facilitator's Guide</u> (REL Southeast)
- Professional learning communities facilitator's guide for the What Works Clearinghouse practice guide: Foundational skills to support reading for understanding in kindergarten through 3rd grade (REL Southeast)
- <u>Professional Learning Communities Facilitator's Guide for the What Works</u>
 <u>Clearinghouse Practice Guide Teaching Academic Content and Literacy to English Learners in Elementary and Middle School (REL Southwest)</u>
- 3. **Steps for Institutionalizing Supports for Evidence-Based Practice:** In order for schools, districts, and postsecondary institutions to support educators and instructors in the implementation of evidence-based practices and to ensure that those practices are sustained over time, they will need to institutionalize support systems. These systems may include elements such as regular time for educators and postsecondary instructors (if relevant) to learn new practices,

independently of the other recommendations. RELs must consider whether recommendations are a package of practices or a single recommendation can be implemented to achieve the intended goal when developing the toolkit.

time for the monitoring of those practices by educators and leaders and the institutional structures, and resources to which educators and leaders can turn for implementation and monitoring activities and problem solving. The third part of the toolkit shall include implementation steps for institutionalizing such supports. Some of the WWC Practice Guides address the implementation of these supports in their section on implementation steps. This toolkit shall provide actionable guidance related to those steps in order to help whole schools and districts set up the necessary support systems. RELs may provide the supports needed for this step in the development and evaluation phase or they may consider partnering with another entity, such as a Comprehensive Center to provide technical support. Offerors are expected to take account of potential roadblocks and solutions identified in the Practice Guide when developing implementation steps, as appropriate.

Toolkit Development and Review Process

RELs shall develop the toolkit in consultation with partners and with the support of content experts to support the use of evidence-based practices at the classroom, school, or district level. Toolkits based on WWC Practice Guides focused on elementary or secondary learners shall be co-developed with at least one school- and/or district-level partner. Toolkits based on WWC Practice Guides focused on postsecondary learners shall be co-developed with at least one Institute of Higher Education. Other partners may be included as well.

The toolkit must focus on increasing educator (teachers and paraprofessionals if appropriate), or postsecondary instructor use of evidence-based practices. RELs may also include resources for other stakeholders (e.g., parents, school or district leadership), but they are not required. To the extent possible, the toolkit shall be easily adapted to support the specific needs of a variety of audiences. The toolkit shall initially be developed in English and may be translated into another language after the English version has been published by IES.

Toolkits shall be developed in the format most appropriate for their audience; both print and digital options are allowable. If a REL gets approval to develop a web-based tool, the REL Website contractor will cover the programming and web development costs up to a predetermined amount. The REL Website Contract will include funds to cover a set amount of tool development costs for each REL. If a REL proposes to develop a tool (or tools) that will require more programming work than can be covered by the Website contract's budget for that REL, the REL contractor will pay for the additional required programming costs using REL funds. The REL will also be responsible for the costs of developing the content of the tool, as well as their own costs related to collaborating with the Website contractor to determine the technical requirements and test the programming. Once the toolkit proposal is submitted to IES, if it requires collaboration with the REL Website contractor, both entities along with the COR will meet for approximately one hour to discuss the scope of work and budget implications prior to the proposal being accepted.

The toolkit proposal will be submitted as part of the REL competition proposal materials. Upon award of the REL contract, successful offerors will submit the toolkit proposal to their SME for review, include the proposed labor hours and costs for the project, and then submit it to IES for COR, Associate Commissioner, and Commissioner review. The toolkit proposal will not receive RPR review. The actual toolkit will be reviewed by the COR, peer reviewed by the REL peer- review contractor (RPR), and approved by the NCEE Associate Commissioner and NCEE Commissioner.

Toolkit Evaluation and Review Process

The toolkit in Subtask 5.2 also requires two forms of evaluation:

- 1. First, RELs must formatively evaluate the usability of the tool with its intended audience during development. Usability refers to the quality of a user's experience when interacting with the toolkit and includes at least the following two factors:
 - Ease of use: Whether a user can understand how to use the toolkit and can accomplish the tasks that the toolkit outlines without the assistance of the REL or another technical assistance provider.
 - O **Subjective satisfaction:** The extent to which a toolkit user reports that they like using the toolkit, and would recommend the toolkit to others.

The formative evaluation is a component of the toolkit development phase under Subtask 5.2.

2. Second, RELs must evaluate the efficacy and implementation of the finished toolkit's Professional Development Resources, either individually, in related subsets, or as a whole, under Subtask 5.1 prior to the toolkit's release by IES. Such an evaluation shall examine changes in teacher practice and may also include measures of teacher knowledge and/or teacher self-efficacy. The evaluation must also examine learner outcomes (e.g., academic or behavioral outcomes). The efficacy portion of the evaluation should be designed to meet What Works Clearinghouse Standards, version 4.1, to the extent practicable. IES acknowledges that these studies are exploratory in nature.

Note that partner K-12 schools or IHEs involved in the usability trials (above) may not be included in subsequent efficacy and implementation trials. For example, REL Mid- Atlantic may partner with one district and/or one school in Pennsylvania school to develop the toolkit and conduct the formative evaluation, and then partner with different schools in Pennsylvania or other states in the REL Mid-Atlantic region to evaluate the efficacy and implementation of the finished toolkit. In addition, RELs may provide implementation supports during the efficacy trial; however, these supports must be provided by individuals that are not involved in conducting the evaluation itself.

RELs and their partners need to plan creatively and strategically when designing the toolkit evaluation; in particular when examining the efficacy of the toolkit. For example, evaluations may not be able to use state assessments as an outcome measure because the assessment timeframe may not align with teachers use of the toolkit or may not be available in time for RELs to analyze the data to include in a report. Instead, RELs may consider relying on another type of assessment that will provide the necessary data in a timely fashion. RELs may consider all manner of evaluation methods and approaches (e.g., rapid cycle evaluations, traditional RCTs, interrupted time series, Bayesian analyses) as long as the REL sufficiently justifies the methods they propose to use.

RELs shall follow the review process guidelines for applied research proposals and reports described in Subtask 5.1 when designing and executing the evaluation of the toolkit. The toolkit evaluation proposal shall be submitted to IES as part of the REL competition proposal. After award, successful offerors will revise their proposals based on updated information about the proposed toolkit and the evaluation. Like all 5.1 research proposals and reports, the toolkit evaluation proposal and report will be reviewed by the COR, peer reviewed by RPR, and approved by the NCEE Associate Commissioner and NCEE Commissioner.

Both the toolkit, including usability testing, and evaluation of the toolkit must be completed within the five-year contract period. For that reason, the intended outcomes of the toolkit must include outcomes that

the REL and its partners would expect to occur if the toolkit was implemented in a short time frame. The toolkit must be developed on a timeline that would allow for the draft evaluation report to be <u>submitted</u> to IES no later than September 2025.

As with all applied research reports under Subtask 5.1, the applied research report shall discuss the results of the evaluation of the toolkit with an informed lay audience in mind; in this case teachers, administrators, and parents. The final report should also indicate ways that the toolkit could be improved to be more usable or effective.

Subtask 5.3 Design and test new programs or practices ("interventions") to improve student outcomes (not required).

When there are few or no effective interventions in a potentially high-leverage domain of work with partners, RELs are permitted, but not required to design new programs or practices to meet partner and stakeholder needs. ⁴¹ These interventions should be informed by extant evidence and applicable theory. Interventions must be "manualized" such that they can be readily replicated elsewhere with fidelity if shown to be efficacious. Further, while some components of an intervention may be similar to materials developed under the TCTS task, materials developed under this subtask should have broader applicability.

Interventions must be co-developed with at least one state, district, institution, or building-level partner. Other partners may be included as well to inform the intervention's design, to support the intervention's implementation, or to conduct some or all of the required evaluation.

Any new intervention developed under this task requires two forms of evaluation.

- 1. First, RELs must evaluate the usability, if applicable, of the intervention (usability in this Subtask is the same as defined under Subtask 5.2).
- 2. Second, RELs must evaluate the efficacy and implementation of the intervention under Subtask 5.1 prior to the intervention's release by IES. Such an evaluation should at a minimum examine relevant short-term outcomes on the individuals and/or systems an intervention is designed to affect. Said evaluation should also seek to identify ways in which the intervention might be improved to be more usable, efficient, or effective. To the extent feasible, individuals or schools involved in the design of the intervention should not be included in the implementation study or evaluation.

RELs shall follow the review process guidelines for applied research proposals and reports described in Subtask 5.1 when developing the intervention and designing and executing the efficacy and implementation evaluation of the intervention. As with all applied research reports under Subtask 5.1, the evaluation report shall discuss the results with an informed lay audience in mind.

If a REL decides to develop an online tool, the content shall be developed by the REL but the programming for the tool shall be developed and maintained by the REL Website contractor, similar to any online tool developed in Subtask 5.2. The REL COR will facilitate conversations between the REL and the REL Website contractor to determine the scope, requirements, and timeline for each project under this task. The technical design of online tools should be as simple as possible to meet the intended goals.

All work under this Subtask must be completed within the five-year contract, including the review and publication of the intervention and study. For that reason, RELs must think carefully about: (1) the scope

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⁴¹ RELs wanting to rigorously evaluate extant interventions should propose that work under Subtask 5.1.

of the intervention design and evaluation work and resulting schedule, and (2) what can be learned from the design and testing of a new intervention irrespective of the results of its efficacy trial. The intervention must be developed on a timeline that allows the draft evaluation report to be <u>submitted</u> to IES no later than September 2025.

Subtask 5.4 Develop tools to support research processes and research-based practices (not required).

If the need exists, RELs may, but are not required to, develop analytic tools that will support partners' and stakeholders' capacities to engage in the research process or tools that help educators implement research-based practices. Examples of analytic tools might include a self- study guide, a tool to support the development of a survey instrument, or a how-to-guide for conducting an analysis. Further, while some components of a tool may be similar to materials developed under the TCTS task, materials developed under this subtask should have broader applicability.

As noted above, RELs may also develop tools to help educators use research-based practices. A tool of this type may consist of one or a combination of the following components of the toolkits that were discussed above in Subtask 5.2: diagnostic instrument(s) for assessing baseline practice; professional development resources; and instrument(s) for assessing on-going practice. For example, during the 2017 REL cycle, REL Southeast created the *Guide and Checklist for a School Leader's Walkthrough During Literacy Instruction Grades 4-12*, designed to help school leaders observe specific research-based practices during literacy instruction in grade 4–12 classrooms and students' independent use or application of those practices.

RELs may not develop a new tool if a similar one already exists. Tools should be developed in partnership with key stakeholders in service of addressing a specific, high leverage need. Tools developed under Subtask 5.4 do not have to be based on WWC Practice Guides, and do not require implementation or efficacy evaluations. Tool proposals and the actual product developed under Subtask 5.4 shall be follow the traditional review process for proposals and tools. (See Appendix E of the Instructions to Offerors.)

If a REL wishes to develop an online tool, the content shall be developed by the REL but the programming for the tool shall be developed and maintained by the REL Website contractor, similar to any online tool developed in Subtask 5.2. The REL COR will facilitate conversations between the REL and the REL Website contractor to determine the scope, requirements, and timeline for each project under this task. The technical design of online tools should be as simple as possible to meet the intended goals.

Subtask 5.5 Conduct assessments of research study quality.

At the request of state and local departments of education, the REL shall conduct reviews of research studies for quality using scientific standards (for example, WWC standards or SEA- or LEA-specific standards) to support agencies' implementation of evidence requirements in their Every Student Succeeds Act (ESSA) plans. These reviews shall assess existing studies related to a specific practice or intervention to help determine their tier of evidence as described by nonregulatory ESSA guidance. ⁴² If the partners decide to use the nonregulatory ESSA guidance or otherwise wish to incorporate WWC standards to review studies, the REL shall use only reviewers certified in the WWC Procedures and Standards version 4.1 (group design) for this task and conduct reviews using the most current WWC standards and materials, including the WWC Online Study Review Guide. Reviews for studies not already reviewed by the WWC that may potentially meet Tier 1 (Strong) or Tier 2 (Moderate) evidence requirements must be

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⁴² https://www2.ed.gov/policy/elsec/leg/essa/guidanceuseseinvestment.pdf

completed using the WWC's Online Study Review Guide and shall be peer reviewed by a WWC contractor.

The REL shall develop a proposal for COR review and approval that discusses the scope, purpose, search methodology, output, timeline and detailed budget, including labor hours. The REL shall prepare a summary memo that describes the study review procedures and results of the review; this memo will be reviewed and approved by the COR. The REL shall also brief requestors on the results and implications of this assessment. As with all meeting materials, any additional materials developed for this briefing shall also be reviewed and approved by the COR.

Subtask 5.6 Conduct original applied research that involves students, parents, and other community members (not required).

This subtask is for RELs to undertake applied research that involves a wider group of stakeholders than the typical REL research project. A REL may conduct a study under Subtask 5.6 when a REL and partners identify the need for an applied research study that will help address a high-leverage problem and the REL and the partners believe that the study would benefit from the on-going input of students, parents, or other community members. There is no requirement for the REL to do work under this Subtask during the contract period.

As with other research projects, projects under this subtask shall include a strong justification for the relevance and rigor of the proposed work. In addition, the work under this subtask shall also be designed to both inform policy decisions and help build knowledge towards future decisions by practitioners or policymakers related to education policy or practice.

The REL projects under this task shall involve students, parents, or other community members from very beginning. Students, parents or other community members shall be invited to help identify and refine the study questions and provide input on the study methods from the very beginning of the project. In addition, the study shall involve original collection of data from relevant students, parents, or other community members through such methods as a survey and/or interviews, focus groups and observations. The REL shall work with IES to obtain OMB approval for such data collection within the first two years of the contract. Typically, studies under this subtask involve mixed methods – both qualitative and quantitative data collection and analyses.

This subtask may be particularly appropriate for research that involves racial or socio-economic equity issues, but RELs can consider this Subtask for any work in which on-going involvement of students, parents and other community members is appropriate.

All the work of this Subtask shall be done as outlined under the following sections of Subtask 5.1:

- Develop Research Proposals
- Documentation for Applied Research Projects
- Reporting Applied Research Findings

Task 5 Quality Assurance Procedures

The REL shall establish a process for ensuring that the work of the REL is of the highest quality and that all published products will meet IES review standards for rigor, relevance, quality, clarity, and plain

language.⁴³ The REL shall ensure that personnel with appropriate cultural understanding, content knowledge, and methodological expertise to conduct careful reviews of research proposals and products before submission to the COR. In addition, the REL shall ensure that:

• RELs are encouraged to have at least one representative of the target audience co-develop or provide an internal review of Task 5 proposals and products before submission to IES in order to maximize relevance, usability, and actionability. All products receive extensive editorial attention with an emphasis on plain language. IES expects that each REL shall have authors of REL products invest extensively in drafting and editing their own products so that the writing is very clear and is succinct as possible. IES also expects RELs to invest extensively in the editing of products by an in- house editor before each product is submitted to IES.

In addition to the internal quality assurance procedures listed above, the REL shall propose an external SME whose roles within the project will be to review and provide feedback on draft proposals and end products, and act as an advisor to the project team on the design and content of applied research projects throughout the life of the project (except projects under Subtask 5.5). The SME must be external to the project. That is, a SME cannot work on the project (or set of closely related projects) for which they act as a SME in any other capacity.

The REL may propose SMEs on a project-by-project basis, or submit a running list of experts, along with their affiliations, backgrounds, areas of expertise and a resume or CV for pre- approval. The SME must have content and design/methodological expertise related to the Task 5 project. The REL may decide to identify two SMEs for a project if someone with both content and methodological expertise is not available to serve in this role. Regardless, RELs must propose experts and provide documentation of their substantive expertise relevant to the project for approval before submitting a proposal for an applied research project. The REL shall also submit a memo along with proposal and product submissions outlining 1) the experts' feedback on proposals and products; and 2) the REL's response to the experts' feedback.

Task 5 Deliverables

Table 5 provides a list of required deliverables for work conducted under Task 5, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

Table 5: Deliverables under Task 5

Subtask	Deliverables	Due Date			
5.1	Conduct original, empirical research and develop products				
	Concept paper	As needed			
	Proposal As propo				
	Notice of IRB approval or exemption	As proposed			
	Data Management Plan (if applicable to the study) As pro-				
	OMB clearance package (if applicable to the study)	As proposed			
	Data sharing agreement or memorandum of understanding (optional)	As proposed			

⁴³ For more information about writing about research in everyday language, see: https://files.eric.ed.gov/fulltext/ED545224.pdf

	Applied research written product ⁴⁴	As proposed				
5.2	Develop a toolkit based on WWC Practice Guides to support educators use of evidence-based					
	practices					
	Concept paper	As needed				
	Proposal for toolkit	As proposed				
	Toolkit	As proposed				
	Summary of revisions to toolkit based on efficacy evaluation results	As needed				
5.3	Design and test new programs, policies, or practices ("intervention") to improv	e student				
	outcomes (not required)					
	Concept paper	As needed				
	Proposal for intervention	As proposed				
	Periodic summary of development, usability testing, and modifications made	As proposed				
	to intervention					
	Intervention	As proposed				
	Summary of revisions to intervention based on efficacy evaluation results	As needed				
5.4	Develop tools to support research (not required)					
	Concept paper	As needed				
	Proposal for tool	As proposed				
	Tool	As proposed				
5.5	Conduct assessment of research study quality for ESSA compliance.					
	Concept paper	As needed				
	Proposal	As proposed				
	Study review(s), peer reviewed by WWC contractor if reviewed using	As proposed				
	WWC standards					
	Summary memo and/or associated materials for partners/stakeholders	As proposed				
5.6	Conduct original applied research that involves students, parents, and other community					
	members (not required)					
	Concept paper	As needed				
	Proposal	As proposed				
	Notice of IRB approval or exemption	As proposed				
	Data Management Plan (if applicable to the study)	As proposed				
	OMB clearance package (if applicable to the study)	As proposed				
	Data sharing agreement or memorandum of understanding (optional)	As proposed				
	Applied research written product ⁴⁵	As proposed				

Task 6: Dissemination

The purpose of the Dissemination task is to enable education stakeholders to learn about and identify ways to apply the most up-to-date research in education to high leverage issues of policy and practice. Therefore, work under this task includes disseminating the results of REL work as well as the results of peer-reviewed research not conducted by the REL.

RELs shall craft dissemination strategies for their products based on their partners' needs and intended outcomes. The REL shall work with their partners to target their work to the specific audiences of interest, particularly those best positioned to help partnerships realize their intended outcomes. RELs shall

⁴⁴ "Written Product" in this case denotes both traditional research reports as well as alternate formats such as power point slide decks and infographics.

⁴⁵ "Written Product" in this case denotes both traditional research reports as well as alternate formats such as power point slide decks and infographics.

also work with their partners to share dissemination products in the places or through the networks which these audiences are most likely to seek or receive information.

The REL shall disseminate the work in a way so that policymakers and educators can leverage it and apply it to their context. This involves crafting tailored messages and communication strategies to reach specific audiences. Products developed under this Task should be designed to provide engaging experiences that draw in new audiences and engage existing audiences. RELs are also expected to leverage the work of other RELs and Department grantees and contractors to help policymakers and educators benefit from the evidence and practices supported through the federal investment in education research and evaluation. All products developed under this Task will be reviewed and approved by the COR. For Subtasks that require an approved concept paper or proposal (that is, Subtasks 6.2, 6.3, and 6.7), concept papers and proposals shall include shall also include the proposed labor hours and costs for the project. 46

Subtask 6.1 Develop website content

The REL shall be responsible for updating information on their webpages using template forms developed by the external Website contractor. The Website contractor is responsible for the design and structure of the website and RELs are responsible for providing timely and accurate website content in the format specified by the website contractor. RELs are also responsible for ensuring that all updates posted by the REL Website contractor are complete and accurate.

Within four weeks of contract award, the REL is responsible for providing information through an initial set of website forms and submitting them to IES. The REL is expected to submit content as it is developed or conducted such as new blog posts, newsletters, videos, event and TCTS materials, and Applied Research and Peer Reviewed Research-based products once they are approved by IES.

Subtask 6.2 Develop engaging dissemination materials based on scientifically valid research and evidence-based practices

The REL is responsible for creating supporting materials that present its work in succinct, visually engaging formats. Examples of supporting materials include, but are not limited to, short videos, infographics, fact sheets, or handouts.

IES expects that many Task 4 and all Task 5 projects will have supporting Dissemination activities or products. Such products shall be developed under this Subtask. ⁴⁷ Dissemination materials based on Task 4 or Task 5 projects should be proposed in the concept paper and proposal for the Task 4 or Task 5 project. An updated proposal may be submitted, if necessary, with refined ideas for the materials after the Task 4 and Task 5 projects are underway. RELs will be required to submit a concept paper to the COR to propose developing dissemination materials under this Subtask that are not based on an existing Task 4 or Task 5 project.

RELs may also disseminate the findings from publicly available research that may be relevant and useful to a wide audience within their region. Whenever possible, the REL shall prioritize IES-funded work that

⁴⁶ Additional guidance on the content of concept papers and proposals under these Subtasks will be provided post-award. Proposals under these Subtasks will typically require less information and effort than proposals under Tasks 4 and 5 given the smaller scopes of Task 6 projects.

⁴⁷ Infographics, fact sheets, or any other products that are considered the final written product of applied research in lieu of a traditional research report under Task 5 should be developed under Subtask 5.1. Subtask 6.2 should only be used to develop supporting dissemination materials for Task 4 or 5 projects.

is peer-reviewed and freely available. This includes the work of the WWC, evaluations from the National Center for Education Evaluation and Regional Assistance, and work produced by grantees from the NCER and NCSER. RELs may choose to connect multiple pieces of research or focus on a single study and shall ensure the findings of the research are understandable and applicable to their partners and other audiences. Products that connect multiple pieces of research will require review by a SME. 48 RELs may disseminate research findings through videos, infographics, or other methods.

The REL is required to make all materials developed under this task <u>508 compliant</u>. These products will be posted on the REL website by the external website contractor.

Subtask 6.3 Host events and develop conference presentations to disseminate research.

RELs are encouraged to present their work widely through events and conference presentations. Events can be designed to be virtual or in person. RELs are encouraged to collaborate with other federal technical assistance centers, such as the Comprehensive Centers on events and presentations whenever feasible. When RELs host a webinar to disseminate their work, RELs shall develop three supporting products to be submitted to the COR within one month of the webinar:

- A 508 compliant video of the event, including a list of keywords and a description of the event. The event archive will be uploaded to the IES YouTube page.
- A 508 compliant one- to two-page summary of the webinar. This summary should include a brief background on the webinar topic, key research-based takeaways, and quotes from presenters.
- A 508 compliant document that lists audience questions during or after the event along with responses from the presenters.

RELs are encouraged to present at both local and national conferences and convenings of educators and policymakers who are well-situated to apply the lessons learned from REL work to policy or practice, furthering their partners' outcomes. This may include presentations to specific professional associations, membership organizations, state or district-level professional development trainings, and educator-focused conferences. While the REL may present its work at researcher-focused conferences, this should not be the REL's primary focus. Materials for events that connect multiple pieces of research may require review by a SME.

Subtask 6.4 Maintain a newsletter.

The REL shall create a newsletter that includes general updates about the REL including announcements about publications or products that are released, and any upcoming events. Newsletters shall be produced at least four times a year but may be developed more frequently. RELs may also use their newsletter in an ad-hoc manner to announce events and publications. Newsletters may also be topic- or partnership-focused. RELs are encouraged to share blog posts in their newsletters as well. Each newsletter shall be archived on the REL website.

Subtask 6.5 Maintain a blog (not required).

RELs may, but is not required to contribute to the REL Program blog. The blog posts may be newsletter articles (see Subtask 6.4) or unique articles. All blog posts shall tell a short story that explains how the REL's work is helping to advance their partners' outcomes and address high leverage problems in the

⁴⁸ See Task 4 for additional discussion on external subject matter experts (SMEs).

region, and may share products and resources developed by the REL. If a REL chooses to blog, the blog posts shall appear on a regular schedule and shall be produced at least 4 times a year.

Subtask 6.6 Maintain a social media presence.

RELs are responsible for maintaining a consistent social media presence. Currently, the only approved social media network for RELs is Twitter; each of the 10 RELs currently maintain their own account. It is possible that additional social media networks will be approved in the future. The REL is responsible for maintaining their REL's existing Twitter account and posting at least two times per week.

All social media posts must be approved by the COR in advance. RELs may submit periodic batches of posts for COR approval, submit posts to the COR on an ad hoc basis, or combine both strategies. As with all dissemination products, social media posts and follows should be strategic and use easy to understand, clear language.

Subtask 6.7 Develop supporting communications and branding materials.

The REL shall create communications materials that inform policymakers and educators about the existence and purpose of the REL. Under this task the REL may create a brochure or handouts that explain the work of the REL. RELs also may create videos that explain how the REL operates or feature interviews with partners. This should represent a small fraction of the REL's dissemination work, as IES expects that these products will be developed in Year 1 or Year 2 of the five-year REL contract. The REL is expected to develop a proposal for the development of products under this Subtask with their COR as early as possible in the contract period to ensure that work is not duplicated across REL regions.

Task 6 Deliverables

Table 6 provides a list of required deliverables for work conducted under Task 6, as well as their due dates. RELs and IES may negotiate on a project-by-project basis to add deliverables as appropriate.

Table 6: Deliverables under Task 6

Subtask	Deliverables	Due Date					
6.1	Develop website content						
	Complete initial website templates	4 weeks after contract award					
	Quarterly website updates	As proposed					
	Website content templates	2 weeks after the event or					
		product is released and as					
		proposed for blogs and					
		newsletters					
6.2	Develop visually engaging dissemination materials based on scientifically valid research						
	and evidence-based practices						
	Concept Paper	As needed					
	Video Storyboard and script	As proposed					
	Video	As proposed					
	Draft handout, infographic or fact sheet	As proposed					
	Final handout, infographic and fact sheet	As proposed					
6.3	Host events and conference presentations						
	Proposal for event or required proposal for conference	As needed					
	presentation						
	Agenda and materials	2 weeks before the event					
	Stakeholder Feedback Survey	2 weeks after the event (or					
		included in the next monthly					
		progress report)					

	Webinar video, keywords and description for YouTube	4 weeks after the event				
	page	4 weeks after the event				
	Webinar summary	4 weeks after the event				
	Webinar questions and answers document	4 weeks after the event				
6.4	Maintain a newsletter					
	Newsletter	At least quarterly; 4 weeks				
		before scheduled release				
6.5	Maintain a blog (not required)					
	Blog	As proposed; at least 4 weeks				
		before scheduled release				
6.6	Maintain a social media presence.					
	Social media posts	As proposed				
6.7	Develop supporting communications and branding materials.					
	Proposal	As proposed				
	Video storyboard and script	As proposed				
	Video	As proposed				
	Brochure or Handouts					
	Brochure or handout	As proposed				

Appendix A: The regional configuration for RELs

Regional Educational Laboratory	States and Jurisdictions Included in Region
Appalachia	Kentucky, Tennessee, Virginia, West Virginia
Central	Colorado, Kansas, Missouri, Nebraska, North Dakota, South Dakota, Wyoming
Mid-Atlantic	Delaware, Maryland, New Jersey, Pennsylvania, Washington DC
Midwest	Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin
Northeast and Islands	Connecticut, Maine, Massachusetts, New Hampshire, New York, Puerto Rico, Rhode Island, Vermont, the U.S. Virgin Islands
Northwest	Alaska, Idaho, Montana, Oregon, Washington
Pacific	American Samoa, the Commonwealth of the Northern Mariana Islands, the Federated States of Micronesia (Chuuk, Kosrae, Pohnpei, and Yap), Guam, Hawaii, the Republic of the Marshall Islands, the Republic of Palau
Southeast	Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina
Southwest	Arkansas, Louisiana, New Mexico, Oklahoma, Texas
West	Arizona, California, Nevada, and Utah

Appendix B: Managing Controlled Unclassified Information (CUI)

Requirements

Applicability

The contractor shall be responsible for handling sensitive and/or Controlled Unclassified Information (CUI) that is collected, stored, transmitted, or destroyed for the purposes of this contract in accordance with any applicable laws, regulations and government wide Policies (LRGWP) to include EO 13556, 32 CFR 2002 Part 2, The Department of Education Directive and NIST-800-171B when approved. These requirements apply to the Contractor, its subcontractors and teaming partners, and employees (hereafter referred to collectively as "Contractor"). These requirements are applicable to all Department information and data, regardless of medium, maintained by the Contractor for the performance of this contract.

Authorization to Handle CUI

No person may have access to CUI unless that person has a valid need for such access in connection with the accomplishment of a lawful and authorized US Government mission. The Authorized holder is an individual, agency, organization, or group of users that is permitted to designate or handle CUI, in accordance with 32 CFR Part 2002. The authorized holder who designates the CUI must make recipients aware of the information's CUI status in accordance with 32 CFR Part 2002.

Safeguarding

The contractor shall be responsible for safeguarding any CUI that is collected for the purposes of this contract. The Contractor shall ensure that the appropriate personnel, administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, audio, video, documentary material, records and/or equipment is properly protected. The Contractor shall abide by and follow all LRGWP as it pertains to safeguarding of CUI. All electronically stored CUI shall be encrypted at rest and in motion as defined in the SOW. Contractors must take reasonable precautions to guard against unauthorized disclosure of CUI. Contractors must include the following measures among the reasonable precautions:

- Establish controlled environments in which to protect CUI from unauthorized access or disclosure and make use of those controlled environments;
- Reasonably ensure that unauthorized individuals cannot access or observe CUI, or overhear conversations discussing CUI;
- Keep CUI under the authorized holder's direct control or protect it with at least one physical barrier, and reasonably ensure that the authorized holder or the physical barrier protects the CUI from unauthorized access or observation when outside a controlled environment; and
- Protect the confidentiality of CUI that the Department or authorized holders process, store, or transmit on Federal information systems in accordance with the applicable security requirements and controls established in FIPS PUB 199, FIPS PUB 200, and NIST SP 800-53, (incorporated by reference, see § 2002.2), and paragraph (g) of Section 2002.14

- All Contractors must safeguard CUI using one of the following types of standards:
 - o CUI Basic is the default set of standards authorized holders must apply to all CUI.
 - CUI Specified must be safeguarded in accordance with the requirements indicated in the NARA CUI Registry for the designated CUI Category.
- Safeguarding Information systems that process, store, or transmit CUI Basic, in accordance with FIPS PUB 199 (incorporated by reference, see § 2002.2), is categorized at no less than the moderate confidentiality impact level.
- Contractors must also apply the appropriate security requirements and controls from FIPS PUB 200 and NIST SP 800-53 to CUI in accordance with any risk-based tailoring decisions.

Physical Environments

CUI must be stored or handled in controlled environments that prevent or detect unauthorized access. Controlled environment and office spaces should include storing CUI in sealed envelopes, providing electronic locks and cabinets, locked doors, overhead bins and drawers.

Protecting Physical Equipment/Media that contains CUI

All electronic devices, storage media – i.e., video, audio, photographic images must be protected in accordance to the regulations defined in the NARA CUI Registry and mandatory CUI Training.

Protecting CUI when shipping or mailing.

When sending CUI, authorized holders:

- May use the United States Postal Service or any commercial delivery service when they need to transport or deliver CUI to another entity;
- Should use in-transit automated tracking and accountability tools when they send CUI;
- May use interoffice or interagency mail systems to transport CUI; and
- Must mark packages that contain CUI according to marking requirements contained in this part and in guidance published by the CUI EA. See § 2002.20 for more guidance on marking requirements.

Reproducing CUI

When reproducing CUI documents on equipment such as printers, copiers, scanners, or fax machines, ensure that the equipment does not retain data or the agency must otherwise sanitize it in accordance with NIST SP 800-53 (incorporated by reference, see § 2002.2).

Transporting

The Contractor shall not remove material from Government facilities or systems, or facilities or systems operated or maintained on the Government's behalf, without the express written permission of the Head

of the Contracting Activity. When traveling, contractors should ideally store material and equipment containing CUI in a locked vehicle, or in the trunk of a vehicle (weather conditions permitting) and out of plain sight.

Decontrolling

No contractor may decontrol CUI without approval by the CO/COR through the designated owner. Once the approval has been granted, the contractor may remove CUI markings.

Decontrolling does not mean that the information can be released to the public.

Destroying and Deleting CUI

When destroying and deleting CUI, including in electronic form, contractors must do so in a manner that makes it unreadable, indecipherable, and irrecoverable. Contractor must comply with the process - Return of data section documented in this SOW.

Marking

All CUI documents must be protected according to LRGWP as defined in 32 CFR 2002, Part 2, ED Directive and NIST 800-171B (when published). The Contractor will adhere to the procedures for marking CUI as outlined in the NARA CUI Registry. Authorized holders of CUI will be held accountable for knowing and following the marking procedures as defined in the NARA CUI Registry.

Training

The Contractor shall ensure that initial mandatory Handling Sensitive Information training is completed before handling sensitive and CUI. The contractor will complete Functional CUI Training when appropriate and complete annual thereafter. The Contractor shall not allow any employee access to a system of records, or permit any employee to create, collect, use, process, store, maintain, disseminate, disclose, dispose or otherwise handle CUI, or to design, develop, maintain, or operate a system of records unless the employee has completed training, as required by this clause. The Contractor shall maintain and, upon request, provide documentation of completion of privacy training to the Contracting Officer.

Retention of Authorizing Documentation

The Contractor must maintain a current and complete file of all documentation authorizing handling of CUI during the period of performance of the contract, unless otherwise instructed by the Contracting Officer. Documentation will be made accessible during inspections or upon written request by the CO or the COR.

Transmitting

Upon completion of the contract, all CUI information, data, documentary material, records and/or equipment shall be returned to Department control or the Contractor must hold it until otherwise directed.

Self-Inspection

Contractors will be required to perform an annual self-inspection to demonstrate compliance to the CUI program. Self-Inspection Program Requirements include:

- Evaluate adherence to the principles and requirements of the ED Directive (#)
- Safeguarding
- Security Violations
- Education and Training

Compliance with Information Protection Requirements

The Chief Information Officer (CIO) or the Office of Inspector General (OIG), through the CO or COR, reserves the right to verify compliance with information security requirements established by this contract. Verification may include, but is not limited to, onsite or offsite inspections, audits, documentation reviews, process observation, network and IT system scanning. The Contractor will fully comply with all Department-initiated inspections as permissible by law.

Information Security Incidents (ISI)

Contractors must immediately report any and all suspected security incidents, breaches, and events involving Department information to the Department's Computer Incident Response Center (EDCIRC) and the Department's Security Operations Center (EDSOC); EDCIRC@ED.GOV; EDSOC voice: 202-243-6550. The EDSOC is available 24 hours per day, 365 days per year. Contractors must report any and all ISI involving information technology (IT) systems and CUI immediately upon becoming aware of the ISI but no later than 60 minutes after becoming aware of the ISI, regardless of day or time; regardless of internal investigation, evaluation, or confirmation of procedures or activities; and regardless of whether the ISI is suspected, known, or determined to involve IT systems operated in support of this contract.

Misuse of CUI / Incident Response and Access to Contractor Information Technology (IT) Systems

During the period of performance of the contract and throughout any contract close-out period, the Contractor must provide the Department, or its designate, with immediate access to all IT systems used by the Contractor to support the performance of the contract for the purpose of inspection and forensic analysis in the event of an ISI. The Contractor shall immediately notify the appropriate CO upon discovery of any inadvertent or unauthorized disclosures of information, data, documentary materials, records or equipment that is CUI. Disclosure of CUI is limited to authorized personnel with a lawful need-to-know.

Appendix C: IT Accessibility Requirements

Section 508 of the Rehabilitation Act, as amended by the Workforce Investment Act of 1998 (P.L. 105-220) requires that when Federal agencies develop, procure, maintain, or use information and communication technology (ICT), it shall be accessible to people with disabilities. Federal employees and members of the public who have disabilities must have access to, and use of, information and data that is comparable to people without disabilities. Products, platforms and services delivered as part of this work statement that are ICT, or contain ICT, must conform to the Revised 508 Standards, which are located at 36 C.F.R. § 1194.1 & Apps. A, C & D, and available at https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/final-rule/text-of-the-standards-and-guidelines.

Applicable Functional Performance Criteria: All functional performance criteria apply when using an alternative design or technology that achieves substantially equivalent or greater accessibility and usability by individuals with disabilities, than would be provided by conformance to one or more of the requirements in Chapters 4-6 of the Revised 508 Standards, or when Chapters 4-6 do not address one or more functions of ICT.

Applicable requirements for software features and components: All WCAG Level AA Success Criteria, 502 Interoperability with Assistive Technology, 503 Application Applicable requirements for hardware features and components: All requirements apply Applicable support services and documentation: All requirements apply.

Instructions: 1. Provide an Accessibility Conformance Report (ACR) for each commercially available Information and Communication Technology (ICT) item offered through this contract. Create the ACR using the Voluntary Product Accessibility Template Version 2.1 or later, located at https://www.itic.org/policy/accessibility/vpat. Complete each ACR in accordance with the instructions provided in the VPAT template. Each ACR must address the applicable Section 508 requirements referenced in the Work Statement. Each ACR shall state exactly how the ICT meets the applicable standards in the remarks/explanations column, or through additional narrative. All "Not Applicable" (N/A) responses must be explained in the remarks/explanations column or through additional narrative. Address each standard individually and with specificity and clarify whether conformance is achieved throughout the entire ICT Item (for example - user functionality, administrator functionality, and reporting), or only in limited areas of the ICT Item. Provide a description of the evaluation methods used to support Section 508 conformance claims. The agency reserves the right, prior to making an award decision, to perform testing on some or all of the Offeror's proposed ICT items to validate Section 508 conformance claims made in the ACR. 2. Describe your approach to incorporating universal design principles to ensure ICT products or services are designed to support disabled users. 3. Describe plans for features that do not fully conform to the Section 508 Standards. 4. Describe "typical" user scenarios and tasks, including individuals with disabilities, to ensure fair and accurate accessibility testing of the ICT product or service being offered. Instructions: Insert the following language into the Acceptance Criteria section of the solicitation.

Acceptance Criteria: Prior to acceptance, the government reserves the right to perform testing on required ICT items to validate the offeror's Section 508 conformance claims. If the government determines that Section 508 conformance claims provided by the offeror represent a higher level of conformance than what is actually provided to the agency, the government shall, at its option, require the offeror to

remediate the item to align with the offeror's original Section 508 conformance claims prior to acceptance.

ICT Accessibility Requirements Statement per the Revised Section 508 of the Rehabilitation Act Data Services or Information Retrieval Systems Electronic Content

Technical Criteria: E205.1 General -

- Electronic content shall comply with E205.
- E205.2 Public Facing -
- Electronic content that is public facing shall conform to the accessibility requirements specified in E205.4.
- 602 Support Documentation -
- 603 Support Services -
- 302 Functional Performance Criteria -
- Software

Technical Criteria: E207.1 General -

- Where components of ICT are software and transmit information or have a user interface, such components shall conform to E207 and the requirements in Chapter 5.
- E207.2 WCAG Conformance -
- User interface components, as well as the content of platforms and applications, shall conform to Level A and Level AA Success Criteria and Conformance Requirements in WCAG 2.0 (incorporated by reference, see 702.10.1).

E207.2.1 Word Substitution -

• When Applying WCAG to Non-Web Software For non-Web software, wherever the term "Web page" or "page" appears in WCAG 2.0 Level A and AA Success Criteria and Conformance Requirements, the term "software" shall be substituted for the terms "Web page" and "page". In addition, in Success Criterion in 1.4.2, the phrase "in software" shall be substituted for the phrase "on a Web page."

E207.3 Complete Process for Non-Web Software: Where non-Web software requires multiple steps to accomplish an activity, all software related to the activity to be accomplished shall conform to WCAG 2.0 as specified in E207.2.

Exceptions: E501.1 Scope: Where Web applications do not have access to platform accessibility services and do not include components that have access to platform accessibility services, they shall not be required to conform to 502 or 503 provided that they conform to Level A and Level AA Success Criteria and Conformance Requirements in WCAG 2.0 (incorporated by reference, see 702.10.1).

Functional Performance Criteria:

- 301.1 Scope The requirements of Chapter 3 shall apply to ICT where required by 508 Chapter 2 (Scoping Requirements), 255 Chapter 2 (Scoping Requirements), and where otherwise referenced in any other chapter of the Revised 508 Standards or Revised 255 Guidelines.
- 302.1 Without Vision Where a visual mode of operation is provided, ICT shall provide at least one mode of operation that does not require user vision.

- 302.2 With Limited Vision Where a visual mode of operation is provided, ICT shall provide at least one mode of operation that enables users to make use of limited vision.
- 302.3 Without Perception of Color Where a visual mode of operation is provided, ICT shall provide at least one visual mode of operation that does not require user perception of color.
- 302.4 Without Hearing Where an audible mode of operation is provided, ICT shall provide at least one mode of operation that does not require user hearing.
- 302.5 With Limited Hearing Where an audible mode of operation is provided, ICT shall provide at least one mode of operation that enables users to make use of limited hearing.
- 302.6 Without Speech Where speech is used for input, control, or operation, ICT shall provide at least one mode of operation that does not require user speech.
- 302.7 With Limited Manipulation Where a manual mode of operation is provided, ICT shall provide at least one mode of operation that does not require fine motor control or simultaneous manual operations.
- 302.8 With Limited Reach and Strength Where a manual mode of operation is provided, ICT shall provide at least one mode of operation that is operable with limited reach and limited strength.
- 302.9 With Limited Language, Cognitive, and Learning Abilities ICT shall provide features making its use by individuals with limited cognitive, language, and learning abilities simpler and easier. END

Appendix D: Records Management Obligations

A. Applicability

This clause applies to all Contractors whose employees create, work with, or otherwise handle Federal records, as defined in Section B, regardless of the medium in which the record exists.

B. Definitions

"Federal record" as defined in 44 U.S.C. § 3301, includes all recorded information, regardless of form or characteristics, made or received by a Federal agency under Federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the United States Government or because of the informational value of data in them.

The term Federal record: includes IES records; does not include personal materials; applies to records created, received, or maintained by Contractors pursuant to their IES contract; may include deliverables and documentation associated with deliverables.

C. Requirements

Contractor shall comply with all applicable records management laws and regulations, as well as National Archives and Records Administration (NARA) records policies, including but not limited to the Federal Records Act (44 U.S.C. chs. 21, 29, 31, 33), NARA regulations at 36 CFR Chapter XII Subchapter B, and those policies associated with the safeguarding of records covered by the Privacy Act of 1974 (5 U.S.C. 552a). These policies include the preservation of all records, regardless of form or characteristics, mode of transmission, or state of completion.

In accordance with 36 CFR 1222.32, all data created for Government use and delivered to, or falling under the legal control of, the Government are Federal records subject to the provisions of 44 U.S.C. chapters 21, 29, 31, and 33, the Freedom of Information Act (FOIA) (5 U.S.C. 552), as amended, and the Privacy Act of 1974 (5 U.S.C. 552a), as amended and must be managed and scheduled for disposition only as permitted by statute or regulation.

In accordance with 36 CFR 1222.32, Contractor shall maintain all records created for Government use or created in the course of performing the contract and/or delivered to, or under the legal control of the Government and must be managed in accordance with Federal law.

Electronic records and associated metadata must be accompanied by sufficient technical documentation to permit understanding and use of the records and data, which should address at minimum the following according to 36 CFR 1236.10:

The following types of records management controls are needed to ensure that Federal records in electronic information systems can provide adequate and proper documentation of agency business for as long as the information is needed. Agencies must incorporate controls into the electronic information

system or integrate them into a recordkeeping system that is external to the information system itself (see § 1236.20 of this part).

- (a) Reliability: Controls to ensure a full and accurate representation of the transactions, activities or facts to which they attest and can be depended upon in the course of subsequent transactions or activities.
- (b) Authenticity: Controls to protect against unauthorized addition, deletion, alteration, use, and concealment.
- (c) Integrity: Controls, such as audit trails, to ensure records are complete and unaltered.
- (d) Usability: Mechanisms to ensure records can be located, retrieved, presented, and interpreted.
- (e) Content: Mechanisms to preserve the information contained within the record itself that was produced by the creator of the record;
- (f) Context: Mechanisms to implement cross-references to related records that show the organizational, functional, and operational circumstances about the record, which will vary depending upon the business, legal, and regulatory requirements of the business activity; and
- (g) Structure: controls to ensure the maintenance of the physical and logical format of the records and the relationships between the data elements.

The Department and its contractors are responsible for preventing the alienation or unauthorized destruction of records, including all forms of mutilation. Records may not be removed from the legal custody of IES or destroyed except for in accordance with the provisions of the agency records schedules and with the written concurrence of the Head of the Contracting Activity.

Willful and unlawful destruction, damage or alienation of Federal records is subject to the fines and penalties imposed by 18 U.S.C. 2701. In the event of any unlawful or accidental removal, defacing, alteration, or destruction of records, Contractor must report to IES. The agency must report promptly to NARA in accordance with 36 CFR 1230.

The Contractor shall immediately notify the appropriate Contracting Officer upon discovery of any inadvertent or unauthorized disclosures of information, data, documentary materials, records or equipment. Disclosure of non-public information is limited to authorized personnel with a need-to-know as described in the contract. The Contractor shall ensure that the appropriate personnel, administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, documentary material, records and/or equipment is properly protected. The Contractor shall not remove material from Government facilities or systems, or facilities or systems operated or maintained on the Government's behalf, without the express written permission of the Head of the Contracting Activity. When information, data, documentary material, records and/or equipment is no longer required, it shall be returned to IES control or the Contractor must hold it until otherwise directed. Items returned to the Government shall be hand-carried, mailed, emailed, or securely electronically transmitted to the Contracting Officer or address prescribed in the contract. Destruction of records is EXPRESSLY PROHIBITED unless in accordance with Paragraph (4).

The Contractor is required to obtain the Contracting Officer's approval prior to engaging in any contractual relationship (sub-contractor) in support of this contract requiring the disclosure of information, documentary material and/or records generated under, or relating to, contracts. The Contractor (and any sub-contractor) is required to abide by Government and IES guidance for protecting sensitive, proprietary information, classified, and controlled unclassified information.

The Contractor shall only use Government IT equipment for purposes specifically tied to or authorized by the contract and in accordance with IES policy.

The Contractor shall not create or maintain any records containing any non-public IES information that are not specifically tied to or authorized by the contract.

The Contractor shall not retain, use, sell, or disseminate copies of any deliverable that contains information covered by the Privacy Act of 1974 or that which is generally protected from public disclosure by an exemption to the Freedom of Information Act.

IES owns the rights to all data and records produced as part of this contract. All deliverables under the contract are the property of the U.S. Government for which IES shall have unlimited rights to use, dispose of, or disclose such data contained therein as it determines to be in the public interest. Any Contractor rights in the data or deliverables must be identified as required by FAR 52.227-11 through FAR 52.227-20.

Training. All Contractor employees assigned to this contract who create, work with or otherwise handle records are required to take IES-provided records management training. The Contractor is responsible for confirming training has been completed according to agency policies, including initial training and any annual or refresher training.

[Note: To the extent an agency requires contractors to complete records management training, the agency must provide the training to the contractor.]

D. Flowdown of requirements to subcontractors

The Contractor shall incorporate the substance of this clause, its terms, and requirements including this paragraph, in all subcontracts under this contract and require written subcontractor acknowledgment of same.

Violation by a subcontractor of any provision set forth in this clause will be attributed to the Contractor.

From: Blaze, Ashley

Bladzi, rishley Rose Driber Gibbs, Joseph; John Hughes; Jennifer Epstein; Nicole Patton-Terry; John Schmick; Sands, Janelle RE: 91990022C0014_P00002 (Yr2 Funding) - REL Southeast Tuesday, December 13, 2022 1:18:00 PM

Subject:

REL Southeast 91990022C0014 P00002 - fully executed.pdf Attachments:

Good day Rose,

See the attached fully executed SF30.

CONTROLLED UNCLASSIFIED INFORMATION/GENERAL PROCUREMENT AND ACQUISITION

Regards,

Ashley Blaze

Contract Specialist

U.S. Department of Education | Office of Finance and Operations

Contracts and Acquisitions Management (CAM) | Program Contracts Group

Phone: 202.389.6867 | Email: Ashley.Blaze@ed.gov

From: Rose Driber <rdriber@fsu.edu> Sent: Friday, December 9, 2022 9:41 AM

To: Blaze, Ashley <Ashley.Blaze@ed.gov>

Cc: Gibbs, Joseph < Joseph. Gibbs@ed.gov>; John Hughes < jhughes@fcrr.org>; Jennifer Epstein < jepstein@fcrr.org>; Nicole Patton-Terry < npattonterry@fsu.edu>; John

Schmick < jschmick@fsu.edu>

Subject: RE: Review Required: 91990022C0014 P00002 (Yr2 Funding) - REL Southeast

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Good afternoon Ashley,

Please see attached partially executed award modification.

If any additional information is required before final execution, please don't hesitate to contact me.

Kind regards,

Rose Driber, MPA, CRA

Assistant Director Sponsored Research Administration Florida State University 874 Traditions Way, 3rd Floor Tallahassee, FL 32306-4166 Phone: 850-644-8652

From: Blaze, Ashley < Ashley.Blaze@ed.gov> Sent: Wednesday, December 7, 2022 8:39 AM

To: Rose Driber < rdriber@fsu.edu>

Cc: Gibbs, Joseph < <u>Joseph Gibbs@ed.gov</u>>; John Hughes < <u>ihughes@fcrr.org</u>>; Tyson Murray < <u>ttmurray@fsu.edu</u>>; Jennifer Epstein < <u>jepstein@fcrr.org</u>>; Nicole Patton-

Terry < npattonterry@fsu.edu>

Subject: Review Required: 91990022C0014_P00002 (Yr2 Funding) - REL Southeast

Importance: High

Good morning Rose,

Please take a moment to review, sign, and return the attached SF30 NLT 4PM EST on 12/12/22.

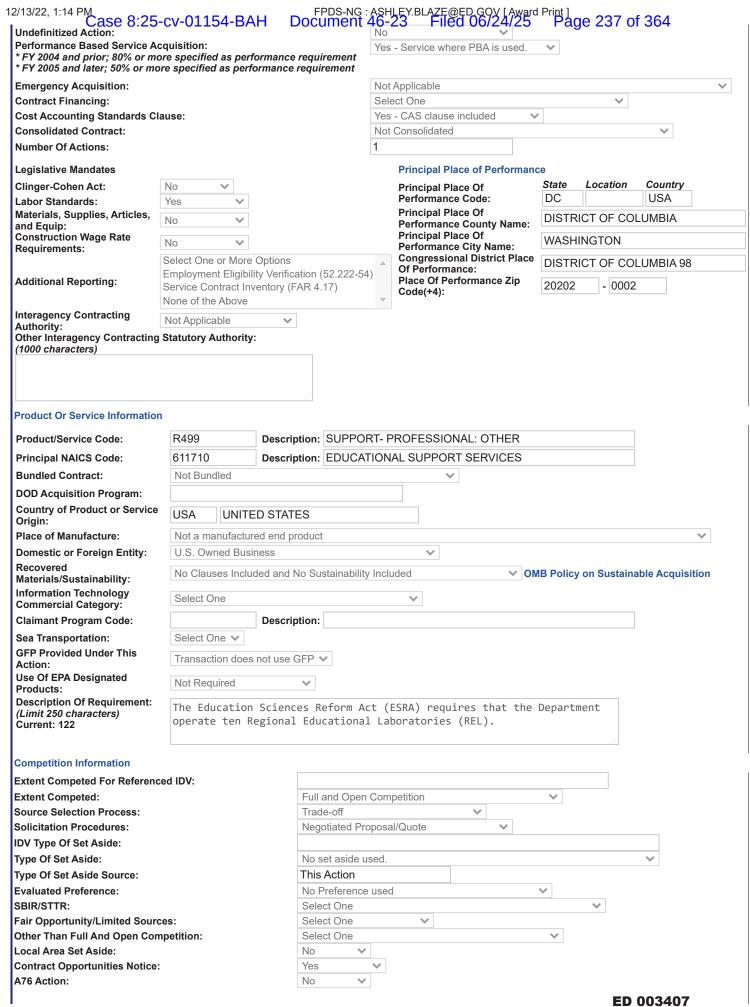
FYI: The attachments referenced in the SF30 are embedded within the PDF.

Regards,

Ashley Blaze
Contract Specialist

U.S. Department of Education | Office of Finance and Operations
Contracts and Acquisitions Management (CAM) | Program Contracts Group

Phone: 202.389.6867 | Email: Ashley.Blaze@ed.gov



2/13/22, 1:14 PM Case 8:25-cv-01154-BAH Commercial Products and Services Acquisition	Jocu Jocu	PDS-NG: J <mark>ment 4</mark>	ASHLEY.BLA	ze@ed.ge -iled 06	0V [Award Pr /24/25	int] Page 2:	38 of 364
Commercial Products and Services Acquisition Procedures:					res not used 🗸		
IDV Number of Offers:							
Number Of Offers Received:	1	N	lumber of Offe	ers Source:	This Action		
Small Business Competitiveness Demonstration Program:							
Simplified Procedures for Certain Commercial Products and Commercial Services:	No	~					
Preference Programs / Other Data							
Contracting Officer's Business Size Selection:		Other tha	an Small Busir	ness 🗸			
Subcontract Plan:		Commerc	cial Subcontra	ct Plan		~	
Price Evaluation Percent Difference:		0	%				

Cor	rease	Review	/ Sheet
UUI	ıuacı	INCRICA	/ JIICCL

Contract Specialist: Ashley Blaze Contracting Officer: Joseph Gibbs

CAM Group: PCG

Tracking #: Solicitation #: Contract #: 91990022C0014

For awards only –
Amount Approved on Acquisition Plan (including addenda, if any):
IGCE Amount (Base and All Options):
Negotiated Amount of Base and Exercised Options:
Negotiated Amount of Base and All Options:
For modifications only –
Amount Approved on Acquisition Plan (including addenda, if any):
IGCE Amount: N/A
Negotiated Amount: N/A
Date of Last Contract Monitoring Plan Review:
Commercial Item: yes no Multi-Year Approval: yes no High-Risk Approval: yes no
Type of Action (check one): Solicitation Award Modification Closeout
Review Request (Insert basic information on type of action for review, for example, "Full and open solicitation for IT support services anticipating an IDIQ contract with FP task orders"): MODCHG
Document location (Insert complete path to document location): \bpvhxwvarc001\OFO\PREVIOUS OCFO\OCFO\CAM\All Contracts\FY21\RELs Recompete FY22-FY27\5. Post Award\2. Modifications\Southeast\P00002 - Add funds & Revise PWS
Level(s) of review required (check all that apply):
CO (every action)
Group Manager (as required by manager and group's written SOPs; all actions that require CRB review)
CRB – electronically (actions with absolute value above \$2M; exceptions listed in APM Chapter 4.170)
☐ CRB – in person (at CRB's discretion)
Please document all comments and their resolution on this form. It is not sufficient for the CS to respond "done;" you must say how you addressed the issue raised. Group Manager and CRB comments shall be identified as High Priority (H),

say how you addressed the issue raised. Group Manager and CRB comments shall be identified as High Priority (H), Medium Priority (M), or Low Priority (L). CRB comments will be consolidated from all reviewers. In-person CRB review may be convened if any High Priority comments are made, or if a combination of Medium and/or Low Priority comments makes in-person review appropriate, or at CRB's discretion.

CONTRACTING OFFICER REVIEW

Contracting Officer Name:

L/M/H	Contracting Officer Comment	Contract Specialist Response / Resolution

OS Approval obtained (CO personally checked for approval on work CFO Approval obtained (CO personally checked for approval on wo Approval not required — Signoff:	1 11 1 1 /

From: John Hughes
To: Blaze, Ashley

Cc: Jennifer Epstein; Sands, Janelle
Subject: RE: New Subcontractor for REL SE
Date: Wednesday, January 11, 2023 12:50:29 PM

Attachments: <u>image001.jpg</u>

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Ashley

They will serve as partnership managers. In this role they will coordinate meeting times, obtaining meeting spaces, help draft meeting agendas, support the content lead in developing meeting materials, and help lead meetings. For example, we would expect them to work with the content lead to plan the content of an upcoming meeting, coordinate with members to arrange a time and location, help develop any materials, and then organize and run the meeting.

Let me know if you need anything else.

John.

From: Blaze, Ashley <Ashley.Blaze@ed.gov>
Sent: Wednesday, January 11, 2023 12:39 PM

To: John Hughes <jhughes@fcrr.org>

Cc: Jennifer Epstein < jepstein@fcrr.org>; Sands, Janelle < Janelle.Sands@ed.gov>

Subject: RE: New Subcontractor for REL SE

Good day John,

How will Chris Gilmer and Dorothy McGill be supporting REL SE?

Thanks.

Ashley

From: John Hughes < jhughes@fcrr.org>
Sent: Tuesday, January 10, 2023 9:52 AM

To: Blaze, Ashley <<u>Ashley.Blaze@ed.gov</u>>; Gibbs, Joseph <<u>Joseph.Gibbs@ed.gov</u>> **Cc:** Jennifer Epstein <<u>iepstein@fcrr.org</u>>; Sands, Janelle <<u>Janelle.Sands@ed.gov</u>>

Subject: RE: New Subcontractor for REL SE

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Ashley

I wanted to check in on this and see if you have an ETA for the review so I can inform my sponsored research office.

Thanks John.

From: Blaze, Ashley < Ashley.Blaze@ed.gov>

Sent: Wednesday, December 21, 2022 11:29 AM

To: John Hughes < <u>ihughes@fcrr.org</u>>; Gibbs, Joseph < <u>Joseph.Gibbs@ed.gov</u>>

Cc: Jennifer Epstein < <u>jepstein@fcrr.org</u>>; Emily Keough < <u>ekeough@fsu.edu</u>>; Sands, Janelle

<<u>Janelle.Sands@ed.gov</u>>

Subject: RE: New Subcontractor for REL SE

Good morning John,

Request received. Ill reach out if I have any additional questions.

CONTROLLED UNCLASSIFIED INFORMATION/GENERAL PROCUREMENT AND ACQUISITION

Regards,

Ashley Blaze

Contract Specialist

U.S. Department of Education | Office of Finance and Operations

Contracts and Acquisitions Management (CAM) | Program Contracts Group

Phone: 202.389.6867 | Email: Ashley.Blaze@ed.gov

From: John Hughes < jhughes@fcrr.org>

Sent: Wednesday, December 21, 2022 11:09 AM

To: Gibbs, Joseph < <u>Joseph.Gibbs@ed.gov</u>>; Blaze, Ashley < <u>Ashley.Blaze@ed.gov</u>>

Cc: Jennifer Epstein < <u>jepstein@fcrr.org</u>>; Emily Keough < <u>ekeough@fsu.edu</u>>; Sands, Janelle

<Janelle.Sands@ed.gov>

Subject: New Subcontractor for REL SE

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Joe and Ashley

We would like to add a new subcontractor to the REL SE contract. Janelle asked us to send this

information to you.

The subcontractor is Innovative Behavioral Services (IBS). Please find attached the CVs for the two key IBS staff – Chris Gilmer and Dorothy McGill. Their loaded rates are: \$104.31 for Chris and \$76.49 for Dorothy.

Please let us know if you need any additional information. John.

John Hughes, Ph.D.

Deputy Director, REL Southeast Florida Center for Reading Research 2010 Levy Ave., Suite 100 Tallahassee, FL 32310

Tel: 850.644.0194

Description: REL SE Logo



Contractor Responsibility Assessment for FLORIDA STATE UNIVERSITY 1/12/2023

Legend					
No Issues Found	Potential Issues	Debarred			

Instructions

To view information. Click on the applicable topic listed in the Table of Contents. To return to this page click on the Home icon located in the top right - hand corner of the page.

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Combines data from FPDS-NG, FAPIIS, a	and SAM to provide an overview of a vendor's contrac	ting history and co	ertifications.
Vendor	Vendor Address		SAM Dates
FLORIDA STATE UNIVERSITY DUNS: ueiSAM: JF2BLNN4PJC3	Tallahassee, FL 32306-0001 Expiration Date: 11/16/2023		
	SAM Warnings as of 1/12/2023 8:17:55 AF	Л	
	Vendor Designations *		True - ✓ False - □
Debarred Vendor Vendor is found to have an existing debarme	nt record. The next page provides details		0
Debt Subject to Offset			
	n that has any unpaid Federal tax liability that has been assess en exhausted or have lapsed, and that is not being paid in a ti		
52.209-11.b.2 - convicted of a felony, last 2 . The Offeror represents that it is a corporation the preceding 24 months.	years n that was convicted of a felony criminal violation under a Fed	leral law within	
52.209-5.a.1.i.A - presently debarred The Offeror certifies, to the best of its knowled debarment, or declared ineligible for the away	edge and belief, that they are presently debarred, suspended, ard of contracts by any Federal agency	proposed for	
been convicted of or had a civil judgment rer with obtaining, attempting to obtain, or perfo Federal or State antitrust statutes relating to	ears edge and belief, that they have, within a three-year period produced against them for: commission of fraud or a criminal offorming a public (Federal, State, or local) contract or subcontrative submission of offers; or commission of embezzlement, the submission of statements, tax evasion, violating Federal criminals.	ense in connection act; violation of eft, forgery,	
52.209-5.a.1.i. C - presently indicted The Offeror certifies, to the best of its knowledge and belief, that they are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision			
52.209-5.a.1.i.D - federal tax delinquency, la The Offeror certifies, to the best of its knowled been notified of any delinquent Federal taxes.			
52.209-5.a.1.ii - term for default, last 3 year . The Offeror has, within a three-year period p Federal agency.	s receding this offer, had one or more contracts terminated for	default by any	
The Offeror represents that it does provide c	ered Telecommunications Equipment or Services overed telecommunications equipment or services as a part of e performance of any contract, subcontract, or other contract		
FAR 52.204-26.c.2 and/or 52.212-3.v.2.ii Cov After conducting a reasonable inquiry for pur telecommunications equipment or services, of equipment or services.			
Vendor has at least one FAPIIS record or FPDS-NG Termination for Cause or Default The next page provides details			



*See Appendix A for what is required for each of the above SAM designations.

FDC_VendorReport - Cover Contractor: FLORIDA STATE UNIVERSITY

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications. **FAPIIS Summary** Record Type Count 0 Administrative Agreement **Defective Pricing** 0 DoD Determination of Contractor Fault 0 Information on Trafficking in Persons 0 Non-Responsibility Determination 0 0 Recipient Not-Qualified Determination **Subcontractor Payment Issues** 0 Termination for Cause 0 Termination for Default 0 Termination for Material Failure to Comply 0

FAPIIS Details				
Record Type	PIID	Ref PIID	Recorded On	
No Data to Display				

	FPDS Details	
Record Type	PIID	Recorded On

No Data to Display

FPDS-NG data, from the prior five years, is accurate as of 1/10/2023 & and all historical FAPIIS data is accurate as of 1/11/2023 10:01:06 AM

Disclaimer

If adverse action is considered as a result of information in this report it is recommended that contracting personnel: 1) per FAR 9.104-5 promptly request additional, possibly clarifying information from the offeror, and 2) validate the information in SAM, FAPIIS and/or FPDS-NG for accuracy and recency.

This Report is based on data and information obtained from U.S. federal databases, including the Federal Procurement Data System – Next Generation database and the System for Award Management database. This Report is provided "as is". FedDataCheck and PotomacWave Consulting Inc. make no representation or warranty, express, implied or otherwise, as to the accuracy or completeness of the data and information contained in this Report. Any alert or warning identified in this Report should be independently verified -- per FAR 9.104-5(a)(1) and per FAR 9.104-5(b)(1) requests for additional information from the offeror should be made promptly. To the extent any alert or warning identified in this Report contains or may contain an error or inaccuracy, the relevant U.S. federal agency should be contacted to correct such error or inaccuracy. FedDataCheck and PotomacWave Consulting Inc. shall have no liability to any party resulting from the use of, or content contained in, this Report, and any action taken by (or omission of) a party relying on this Report shall be the sole responsibility of such party.



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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.		
Self Certified Business Types		
Business Type	SAM Glossary Definition	
Business or Organization		
Educational Institution		
Non-Profit Organization	A Nonprofit Organization is an organization that uses its surplus revenues to achieve its goals rather than distribute them as profit or dividends. The IRS defines this status under Internal Revenue Code 501(c).	
State Controlled Institution of Higher Learning		

Certified Business Types				
Business Type	Certified By	Last Verified Date / Entry Date	Expiration Date / Exit Date	

SBA Certified Business Types include: SBA Certified 8(a) Joint Venture; SBA Certified 8(a) Program Participant; SBA Certified Hub Zone Firm; SBA Certified HuBZone Firm; SBA Certified Small Disadvantaged Business



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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Small Business Representations

The Small Business Administration (SBA), through public rule-making, assigns thresholds to the individual NAICS codes that are used to assess if entities may be considered a small business in certain classification areas. The below list shows business size classifications by NAICS code for this vendor in SAM.gov.

NAICS Code	NAICS desc	Exception String	Small Business*
541330	Engineering Services	NNNN	N
541713	Research and Development in Nanotechnology		N
541714	Research and Development in Biotechnology (except Nanobiotechnology)		N
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	NNNN	N
541720	Research and Development in the Social Sciences and Humanities		N
611310	Colleges, Universities, and Professional Schools		N

^{*} Small Business Size is determined by the values in SAM for each NAICS unless there is an exception. In that case, the size is determined by: all Y in exception string then it is a small business; all N in exception string then it is not a small business; and a combination of Y and N will result in an Unknown (U) business size.



Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Contact Information from SAM

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		vendor com	act information from SAI	VI
Contact Type	Name	Phone / Fax	Email	Address
Accounts Payable	Angela Rowe	8506448659 /	arrowe@FSU.EDU	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306
Accounts Receivable	Angela Rowe	8506448659 /	arrowe@FSU.EDU	,
Alternate Electronic Business	EILEEN CAMPANALE	8506450384 / 8506441464	ECAMPANALE@FSU.EDU	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306
Alternate Government Business	EILEEN CAMPANALE	8506450384 / 8506441464	ECAMPANALE@FSU.EDU	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306
Alternate Past Peformance	Russell Lentz	8506445260 / 8506441464	rlentz@FSU.EDU	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
Alternate Proceedings	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
EDI	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	,
Electronic Business	Esther Wheeler	8506448675 / 8506441464	SRA-PRE@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
Eliminations	Esther Wheeler	8506445260 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
Government Business	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
Party Peforming Certification	Esther Wheeler	8506445260 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
Past Peformance	Russell Lentz	8506448649 / 8506441464	rlentz@fsu.edu	874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306
Proceedings	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
Sales	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAYTALLAHASSEE, FL 32306
Sole Prop	Esther Wheeler	8506448675 / 8506441464	ejwheeler@fsu.edu	,
		Vendor Cage I	nformation from SAM	
DUNS + 4	Cage	Address Type		Address
-	3S772	Physical	cal 874 Traditions Way, Tallahassee, FL 32306 - 0001	
		1		,



3S772

Mailing

874 TRADITIONS WAY, TALLAHASSEE, FL 32306 - 4166

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Buy American Certificates and Trade Agreements Certificates

Foreign End Product Response (52.212-3.f)

Are any end products delivered to the Government by FLORIDA STATE UNIVERSITY foreign (nondomestic) end products?

Vendor will provide information with specific offers to the Government

Foreign End Products Supplied by Vendor as designated in SAM

The following are end products that the contractor has designated in SAM that are sourced from a foreign country. A check mark signifies the contractor has included that product in their FAR response to that section in SAM. FAR 52.212.3.f refers to Buy American Certificates and FAR 52.212.3.g refers to Buy American and/or Trade Agreements Certificates.

End Product Country

No End Products in SAM

Please reference FAR 52.212-3 for guidance



FDC_VendorReport - EndProducts Contractor: FLORIDA STATE UNIVERSITY

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.				
Vendor Awards with Civilian Agencies: FPDS-NG Overview for Current and the Prior Fiscal Year				
US Contracting Department	Obligated Amount	Transactions		
Agency For International Development	\$403,412	1		
Commerce	\$10,000	6		
Education	\$11,551,203	3		
Interior	\$41,113	8		
National Aeronautics And Space Administration	\$40,000	1		
Veterans Affairs	\$60,000	2		
NAICS	Obligated Amount	Transactions		
483114 - Coastal and Great Lakes Passenger Transportation	\$0	4		
541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	\$70,000	4		
541990 - All Other Professional, Scientific, and Technical Services	\$16,611	5		
611310 - Colleges, Universities, and Professional Schools	\$64,502	4		
611710 - Educational Support Services	\$11,954,615	4		
PSC	Obligated Amount	Transactions		
AR11 - R&D- Space: Aeronautics/Space Technology (Basic Research)	\$40,000	1		
AZ11 - R&D- Other Research And Development (Basic Research)	\$60,000	2		
B526 - Special Studies/Analysis- Oceanological	(\$2,540)	4		
B529 - Special Studies/Analysis- Scientific Data	\$10,000	2		
F020 - Natural Resources/Conservation- Fisheries Resources Management	\$0	4		
R499 - Support- Professional: Other	\$11,551,203	3		
R799 - Support- Management: Other	\$24,502	3		
U008 - Education/Training- Training/Curriculum Development	\$403,412	1		



W020 - Lease Or Rental Of Equipment- Ship And Marine

Equipment

\$19,150

1

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS-NG Details (Most recent 25 transactions shown)					
Contracting Department	Contract Identification Info	Date Signed	Obligated Amount	NAICS & PSC	Contract description on base award
Education	91990022C0014 P00002	12/09/2022	\$6,323,007	NAICS: 611710 - Educational Support Services PSC: R499 - Support- Professional: Other	REL SOUTHEAST REGION AWARD.
Interior	140D0421P0124 P00003	11/02/2022	\$0	NAICS: 611310 - Colleges, Universities, and Professional Schools PSC: R799 - Support- Management: Other	RECRUITING SERVICES - FLORIDA STATE UNIVERSITY
Agency For International Development	72061220P00001 P00002	09/26/2022	\$403,412	NAICS: 611710 - Educational Support Services PSC: U008 - Education/Training- Training/Curriculum Development	TECHNICAL ASSISTANCE FOR NATIONAL READING PROGRAM (NRP)IMPLEMENTATION AND EXPANSION
National Aeronautics And Space Administration	80NSSC22PB528 0	08/08/2022	\$40,000	NAICS: 611310 - Colleges, Universities, and Professional Schools PSC: AR11 - R&D- Space: Aeronautics/Space Technology (Basic Research)	FLORIDA STATE UNIVERSITY (FSU) HAS DEVELOPED A NEW PROPRIETARY SOA PARTIAL DISCHARGE AND EROSION TEST METHOD AND NEW EROSION TESTING AND ANALYSIS OF GRC ELECTRIC INSULATION NANO COMPOSITES.
Interior	140D0421P0124 P00002	06/27/2022	\$24,502	NAICS: 611310 - Colleges, Universities, and Professional Schools PSC: R799 - Support- Management: Other	RECRUITING SERVICES - FLORIDA STATE UNIVERSITY
Education	91990022C0014 P00001	06/09/2022	\$139,213	NAICS: 611710 - Educational Support Services PSC: R499 - Support- Professional: Other	REL SOUTHEAST REGION AWARD.
Commerce	1305M220PNFFN0463 P22003	05/11/2022	\$10,000	NAICS: 541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) PSC: B529 - Special Studies/Analysis- Scientific Data	SHARK PUPPING SURVEYS
Commerce	1333MF21PNFFN0135 P22002	04/26/2022	\$0	NAICS: 483114 - Coastal and Great Lakes Passenger Transportation PSC: F020 - Natural Resources/Conservation- Fisheries Resources Management	VESSEL CHARTER WITH CRUISING SPEED OF AT LEAST 10 KNOTS FOR DEPLOYMENT AND RETRIEVAL OF STATIONARY VIDEO CAMERAS AND FISH TRAPPING
Interior	140G0122P0075 0	03/31/2022	\$19,150	NAICS: 541990 - All Other Professional, Scientific, and Technical Services PSC: W020 - Lease Or Rental Of Equipment- Ship And Marine Equipment	UNOLS R/V APALACHEE RENTAL



Case 8:25-cv-01154-BALL Document 46-23 Filed 06/24/25 Page 253 of 364 Contractor Responsibility Assessment



Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications. Vendor Awards with Civilian Agencies: FPDS-NG Details (Most recent 25 transactions shown) Contracting **Contract Identification** Obligated Contract description on base **Date Signed NAICS & PSC** Department Info **Amount** award Interior 140G0121P0330 P00004 03/09/2022 (\$2,540) NAICS: 541990 - All Other UNOLS R/V APALACHEE RENTAL Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis-Oceanological Commerce 1333MF21PNFFN0022 01/31/2022 \$0 NAICS: 483114 - Coastal and Great NORTHERN GULF OF MEXICO P22004 Lakes Passenger Transportation RESEARCH CRUISE PSC: F020 - Natural Resources/Conservation-Fisheries Resources Management Education 91990022C0014 0 01/24/2022 \$5,088,983 NAICS: 611710 - Educational Support REL SOUTHEAST REGION AWARD. PSC: R499 - Support- Professional: Other Interior 01/10/2022 \$0 NAICS: 611310 - Colleges, **RECRUITING SERVICES - FLORIDA** 140D0421P0124 P00001 Universities, and Professional STATE UNIVERSITY Schools PSC: R799 - Support- Management: Other \$0 NAICS: 541990 - All Other UNOLS R/V APALACHEE RENTAL Interior 140G0121P0330 P00003 12/16/2021 Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis-Oceanological NORTHERN GULF OF MEXICO 1333MF21PNFFN0022 12/15/2021 \$0 NAICS: 483114 - Coastal and Great Commerce P22003 Lakes Passenger Transportation **RESEARCH CRUISE** PSC: F020 - Natural Resources/Conservation-Fisheries **Resources Management** 1305M220PNFFN0463 11/29/2021 \$0 NAICS: 541715 - Research and SHARK PUPPING SURVEYS Commerce P22002 Development in the Physical,

> Engineering, and Life Sciences (except Nanotechnology and

PSC: B529 - Special Studies/Analysis-

Professional, Scientific, and Technical

PSC: B526 - Special Studies/Analysis-

Professional, Scientific, and Technical

PSC: B526 - Special Studies/Analysis-

Biotechnology)

Scientific Data

Oceanological

Oceanological

Services

Services

\$0 NAICS: 541990 - All Other

\$0 NAICS: 541990 - All Other



140G0121P0330 P00001

140G0121P0330 P00002

11/17/2021

11/17/2021

Interior

Interior

UNOLS R/V APALACHEE RENTAL

UNOLS R/V APALACHEE RENTAL

Contractor Responsibility Assessment

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor Awards with Civilian Agencies: FPDS-NG Details (Most recent 25 transactions shown)					
Contracting Department	Contract Identification Info	Date Signed	Obligated Amount	NAICS & PSC	Contract description on base award
Commerce	1333MF21PNFFN0135 P22001	11/16/2021	\$0	NAICS: 483114 - Coastal and Great Lakes Passenger Transportation PSC: F020 - Natural Resources/Conservation- Fisheries Resources Management	VESSEL CHARTER WITH CRUISING SPEED OF AT LEAST 10 KNOTS FOR DEPLOYMENT AND RETRIEVAL OF STATIONARY VIDEO CAMERAS AND FISH TRAPPING
Veterans Affairs	36C26320C0036 P00007	10/29/2021	\$30,000	NAICS: 541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) PSC: AZ11 - R&D- Other Research And Development (Basic Research)	RESEARCH AND DEVELOPMENT IOWA CITY VA HEALTH CARE SYSTEMS, BASE PLUS 2 OPTION YEARS.
Veterans Affairs	36C26320C0036 P00006	10/01/2021	\$30,000	NAICS: 541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) PSC: AZ11 - R&D- Other Research And Development (Basic Research)	RESEARCH AND DEVELOPMENT IOWA CITY VA HEALTH CARE SYSTEMS, BASE PLUS 2 OPTION YEARS.
Veterans Affairs	36C26320C0036 P00005	08/27/2021	\$0	NAICS: 541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) PSC: AZ11 - R&D- Other Research And Development (Basic Research)	RESEARCH AND DEVELOPMENT IOWA CITY VA HEALTH CARE SYSTEMS, BASE PLUS 2 OPTION YEARS.
Interior	140G0121P0330 0	08/16/2021	\$16,900	NAICS: 541990 - All Other Professional, Scientific, and Technical Services PSC: B526 - Special Studies/Analysis- Oceanological	UNOLS R/V APALACHEE RENTAL
Interior	140D0421P0124 0	07/26/2021	\$23,795	NAICS: 611310 - Colleges, Universities, and Professional Schools PSC: R799 - Support- Management: Other	RECRUITING SERVICES - FLORIDA STATE UNIVERSITY
Commerce	1333MF21PNFFN0135 0 p to 25 most recent transact	07/01/2021		NAICS: 483114 - Coastal and Great Lakes Passenger Transportation PSC: F020 - Natural Resources/Conservation- Fisheries Resources Management	VESSEL CHARTER WITH CRUISING SPEED OF AT LEAST 10 KNOTS FOR DEPLOYMENT AND RETRIEVAL OF STATIONARY VIDEO CAMERAS AND FISH TRAPPING



<u>FPDS-NG – FAR references involving adverse information</u>

Contractor Responsibility Assessment

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications.

Appendix A					
SAM Designation	If Box Has a Check Mark	Source			
Debarred Vendor	Ineligible (Proceedings Pending) Nature (Cause) Preliminary ineligible based upon adequate evidence of conduct indicating a lack of business honesty or integrity, or a lack of business integrity, or regulation, statute, executive order or other legal authority, pending completion of an investigation and/or legal proceedings; or based upon initiation of proceedings to determine final ineligibility based upon regulation, statute, executive order or other legal authority or a lack of business integrity or a preponderance of the evidence of any other cause of a serious and compelling nature that it affects present responsibility. Effect Procurement: Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so. Nonprocurement:	SAM Exclusion Types			
	No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined preliminary ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The termination date will be listed as "Indefinite" (Indef.) unless otherwise specified.				
	Ineligible (Proceedings Completed) Nature (Cause) Determined ineligible upon completion of administrative proceedings establishing by preponderance of the evidence of a cause of a serious and compelling nature that it affects present responsibility; or determined ineligible based on other regulation, statute, executive order or other legal authority. Effect Procurement:				
	Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so. Nonprocurement: No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The period of ineligibility is specified by the termination date.				
	Prohibition/Restriction Nature (Cause) May be subject to sanctions pursuant to the conditions imposed by the U.S. Department of the Treasury (Treasury) Office of Foreign Assets Control (OFAC), or subject to a sanction, restriction or partial denial pursuant to the conditions imposed by the U.S. Department of State (STATE) or Federal agency of the U.S. Government. Effect If you think you have a potential match with an OFAC listing, please visit the following section of OFAC's website for guidance: http://www.treasury.gov/resource-center/faqs/Sanctions/Pages/directions.aspx. For all other prohibitions and restrictions, see the agency note in the Additional Comments field to ascertain the extent or limit on the sanction, restriction or partial denial. If there is no note, contact the agency taking the action for this information.				
	Voluntary Exclusion Nature (Cause) Accepted an agreement to be excluded under the terms of a settlement between the person and one or more agencies. Effect These persons are excluded in accordance with the terms of their voluntary exclusion agreement. See the agency note in the Additional Comments field to ascertain the extent of the exclusion of the limit on the person's participation, in covered transactions. If there is no note, contact the agency taking the action for this information.				



 ${\tt FDC_VendorReport\text{-}HowToWithFAR}$

Contractor Responsibility Assessment

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Combines data from FPDS-NG, FAPIIS, and SAM to provide an overview of a vendor's contracting history and certifications. 52.204-26 or If a box has a check mark and is associated with FAR 52.204-26 or FAR 52.212-3.v.2 Federal Register Citation 52.212-3.v.2 Federal Register Citation 85 FR 42665 85 FR 42665 I. Background. Section 889(a)(1)(B) of the John S. McCain National Defense Authorization Act (NDAA) for Fiscal Year 2019 (Pub. L. 115–232) prohibits executive agencies from entering into, or extending or renewing, a contract with an entity that uses any FAR 4.2103 equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. The provision goes into effect August 13, 2020. FAR 4.2103 (a)(1)(i) If the offeror selects "does not" in response to the provision at 52.204-26 or 52.212-3(v), the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures. FAR 4.2103 (a)(1)(ii) If the offeror selects "does" in response to the provision at 52.204-26 or 52.212-3(v), the offeror must complete the representation at 52.204-24. FAR 4.2103 (a)(2)(i) If the offeror selects "will not" in paragraph (d) of the provision at 52.204-24, the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures. FAR 4.2103 (a)(2)(ii) If an offeror selects "will" in paragraph (d) of the provision at 52.204-24, the offeror must provide the information required by paragraph 52.204-24(e), and the contracting officer shall follow agency procedures. FAR 4.2103 (b) Reporting. If a contractor provides a report pursuant to paragraph (d) of the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment, follow agency procedures. Debt Subject to If a box has a check mark and is associated with Debt Subject to Offset FAR 32.1108 • FAR 32.1108(b)(2)(i) When it is contemplated that the Governmentwide commercial purchase card will be used as the method Offset of payment, and the contract or order is above the micro-purchase threshold, contracting officers are required to verify by looking in the System for Award Management (SAM) whether the contractor has any delinquent debt subject to collection under the Treasury Offset Program (TOP) at contract award and order placement. Information on TOP is available at http://fms.treas.gov/debt/index.html. • FAR 32.1108(b)(2) (ii) The contracting officer shall not authorize the Governmentwide commercial purchase card as a method of payment during any period the SAM indicates that the contractor has delinquent debt subject to collection under the TOP. In such cases, payments under the contract shall be made in accordance with the clause at 52.232-33, Payment by Electronic Funds Transfer-System for Award Management, or 52.232-34, Payment by Electronic Funds Transfer-Other Than System for Award Management, as appropriate (see FAR 32.1110(d)). • FAR 32.1108(b)(2) (iii) Contracting officers shall not use the presence of the SAM debt flag indicator to exclude a contractor from receipt of the contract award or issuance or placement of an order. • FAR 32.1108(b)(2) (iv) The contracting officer may take steps to authorize payment by Governmentwide commercial purchase card when a contractor alerts the contracting officer that the SAM debt flag indicator has been changed to no longer show a delinguent debt. If a box has a check mark and is associated with FAR 52.209-11 FAR 9.104-5(b) 52.209-11 • FAR 9.104-5(b)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405); FAR 9.104-5(b) (2) Notify, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action; and FAR 9.104-5(b) (3) Not award to the corporation unless an agency suspending or debarring official has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government. If a box has a check mark and is associated with FAR 52,209-5 FAR 9.104-5(a) 52.209-5 • FAR 9.104-5(a)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405); and • FAR 9.104-5(a)((2) Notify, prior to proceeding with award, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action, where an offeror indicates the existence of an indictment, charge, conviction, or civil judgment, or Federal tax delinquency in an amount that exceeds \$3,500.



Market Research



Utilizes data from GSA eLibrary to provide contracting vehicles for the contractor

Vendor GSA eLibrary Information						
Source	Title	Contract Number	T&Cs /Pricelist	Contract End Date	Category	View Catalog

No Data to Report



Reps & Certs from SAM



Certification for: FLORIDA STATE UNIVERSITY

Unique Entity ID: JF2BLNN4PJC3

Certification Validity From: Wed Nov 16 15:00:00 EST 2022 **Certification Validity To:** Thu Nov 16 15:00:00 EST 2023

I have read each of the FAR and DFARS provisions presented on this page. By submitting this certification, I, **Esther Wheeler**, am attesting to the accuracy of the representations and certifications contained herein, including the entire NAICS table. I understand that I may be subject to criminal prosecution under Section 1001, Title 18 of the United States Code or civil liability under the False Claims Act if I misrepresent **FLORIDA STATE UNIVERSITY** in any of these representations or certifications to the Government.

By maintaining an active entity registration in SAM, the entity complied with requirements to report proceedings data in accordance with:

- FAR 52.209-7 Information Regarding Responsibility Matters and with requirements to report executive compensation data in accordance with
- FAR 52.204-10 Reporting Executive Compensation and First-Tier Subcontract Awards.

READ ONLY PROVISIONS

FAR 52.203-11

Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions

(Sep 2007)

- (a) Definitions. As used in this provision-"Lobbying contact" has the meaning provided at 2 U.S.C. 1602(8). The terms "agency," "influencing or attempting to influence," "officer or employee of an agency," "person," "reasonable compensation," and "regularly employed" are defined in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12).
- (b) Prohibition. The prohibition and exceptions contained in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12) are hereby incorporated by reference in this provision.
- (c) Certification. The offeror, by signing its offer, hereby certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on its behalf in connection with the awarding of this contract.
- (d) Disclosure. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.
- (e) Penalty. Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by 31 U.S.C. 1352. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure required to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

(End of Provision)

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FAR 52.203-18

Internal Confidentiality Agreements or Statements-

(JAN 2017)

Representation

As prescribed in 3.909–3(a), insert the following provision: Prohibition on Contracting With Entities That Require Certain Internal Confidentiality Agreements or Statements-Representation (JAN 2017)

- (a) Definition. Internal confidentiality agreement or statement, subcontract, and subcontractor, as used in this provision, are defined in the clause at 52.203-19, Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements.
- (b) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use funds appropriated (or otherwise made available) for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.
- (c) The prohibition in paragraph (b) of this provision does not contravene requirements applicable to Standard Form 312, (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartmented Information Nondisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.
- (d) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).

(End of Provision)

FAR 52.222-38 Compliance with Veterans' Employment Reporting Requirements

(Feb 2016)

As prescribed in 22.1310 (c), insert the following provision:

COMPLIANCE WITH VETERANS' EMPLOYMENT REPORTING REQUIREMENTS (Feb 2016)

By submission of its offer, the offeror represents that, if it is subject to the reporting requirements of 38 U.S.C. 4212(d) (i.e., if it has any contract containing Federal Acquisition Regulation clause 52.222-37, Employment Reports on Veterans), it has filed the most recent VETS-4212 Report required by that clause.

(End of Provision)

FAR 52.222-56 Certification Regarding Trafficking in Persons Compliance Plan

(Oct 2020)

As prescribed in 22.1705(b), insert the following provision:

CERTIFICATION REGARDING TRAFFICKING IN PERSONS COMPLIANCE PLAN (Oct 2020)

- (a) The term "commercially available off-the-shelf (COTS) item," is defined in the clause of this solicitation entitled "Combating Trafficking in Persons" (FAR clause 52.222-50).
- (b) The apparent successful Offeror shall submit, prior to award, a certification, as specified in paragraph (c) of this provision, for the portion (if any) of the contract that-
 - (1) Is for supplies, other than commercially available off-the-shelf items, to be acquired outside the United States, or services to be performed outside the United States; and
 - (2) Has an estimated value that exceeds \$550,000.



- (1) It has implemented a compliance plan to prevent any prohibited activities identified in paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons, and to monitor, detect, and terminate the contract with a subcontractor engaging in prohibited activities identified at paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons; and
- (2) After having conducted due diligence, either-
 - (i) To the best of the Offeror's knowledge and belief, neither it nor any of its proposed agents, subcontractors, or their agents is engaged in any such activities; or
 - (ii) If abuses relating to any of the prohibited activities identified in 52.222-50(b) have been found, the Offeror or proposed subcontractor has taken the appropriate remedial and referral actions.

(End of Provision)

FAR 52.223-1 Biobased Product Certification (May 2012)

(a) As required by the Farm Security and Rural Investment Act of 2002 and the Energy Policy Act of 2005 (7 U.S.C. 8102(c)(3)), the offeror certifies, by signing this offer, that biobased products (within categories of products listed by the United States Department of Agriculture in 7 CFR part 3201, subpart B) to be used or delivered in the performance of the contract, other than biobased products that are not purchased by the offeror as a direct result of this contract, will comply with the applicable specifications or other contractual requirements.

(End of Provision)

FAR 52.225-20 Prohibition on Conducting Restricted Business Operations in Sudan-Certification (Aug 2009)

(a) Definitions. As used in this provision-

"Business operations" means engaging in commerce in any form, including by acquiring, developing, maintaining, owning, selling, possessing, leasing, or operating equipment, facilities, personnel, products, services, personal property, real property, or any other apparatus of business or commerce.

"Marginalized populations of Sudan" means-

- (1) Adversely affected groups in regions authorized to receive assistance under section 8(c) of the Darfur Peace and Accountability Act (Pub. L. 109-344) (50 U.S.C. 1701 note); and
- (2) Marginalized areas in Northern Sudan described in section 4(9) of such Act.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007(Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

- (1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;
- (2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;
- (3) Consist of providing goods or services to marginalized populations of Sudan;
- (4) Consist of providing goods or services to an internationally recognized peacekeeping force 003435

- (5) Consist of providing goods or services that are used only to promote health or education; or
- (6) Have been voluntarily suspended
- (b) Certification. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.

(End of Provision)

Prohibition on Contracting with Entities Engaging in Certain

FAR 52.225-25 Activities or Transactions Relating to Iran - Representation and Certifications (Jun 2020)

(a) Definitions. As used in this provision-

"Person"

- (1) Means-
 - (i) A natural person;
 - (ii) A corporation, business association, partnership, society, trust, financial institution, insurer, underwriter, guarantor, and any other business organization, any other nongovernmental entity, organization, or group, and any governmental entity operating as a business enterprise; and
 - (iii) Any successor to any entity described in paragraph (1)(ii) of this definition; and
- (2) Does not include a government or governmental entity that is not operating as a business enterprise.

"Sensitive technology"-

- (1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-
 - (i) To restrict the free flow of unbiased information in Iran; or
 - (ii) To disrupt, monitor, or otherwise restrict speech of the people of Iran; and
- (2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).
- (b) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.
- (c) Except as provided in paragraph (d) of this provision or if a waiver has been granted in accordance with 25.703-4, by submission of its offer, the offeror-
 - (1) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran;
 - (2) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act. These sanctioned activities are in the areas of development of the petroleum resources of Iran, production of refined petroleum products in Iran, sale and provision of refined petroleum products to Iran, and contributing to

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- (3) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx).
- (d) Exception for trade agreements. The representation requirement of paragraph (c)(1) and the certification requirements of paragraphs (c)(2) and (c)(3) of this provision do not apply if-
 - (1) This solicitation includes a trade agreements notice or certification (e.g., 52.225-4, 52.225-6, 52.225-12, 52.225-24, or comparable agency provision); and
 - (2) The offeror has certified that all the offered products to be supplied are designated country end products or designated country construction material.

(End of Provision)

FAR 52.227-6 Royalty Information (Alternate I)

(Apr 1984)

- (a) Cost or charges for royalties. When the response to this solicitation contains costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:
 - (1) Name and address of licensor.
 - (2) Date of license agreement.
 - (3) Patent numbers, patent application serial numbers, or other basis on which the royalty is payable.
 - (4) Brief description, including any part or model numbers of each contract item or component on which the royalty is payable.
 - (5) Percentage or dollar rate of royalty per unit.
 - (6) Unit price of contract item.
 - (7) Number of units.
 - (8) Total dollar amount of royalties.
- (b) Copies of current licenses. In addition, if specifically requested by the Contracting Officer before execution of the contract, the offeror shall furnish a copy of the current license agreement and an identification of applicable claims of specific patents.

ALTERNATE I (APR 1984)

Substitute the following for the introductory portion of paragraph (a) of the basic clause: When the response to this solicitation covers charges for special construction or special assembly that contain costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:

(End of Provision)

PROVISIONS POPULATED BASED ON REGISTRATION DATA

FAR 52.203-2

Certificate of Independent Price Determination

(Apr 1985)

- (1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
- (2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and
- (3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.
- (b) Each signature on the offer is considered to be a certification by the signatory that the signatory-
 - (1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; or

(2)

- (i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision Rose Driber, Assistant Director, Sponsored Research Administration; Russell Lentz, Associate Director, Sponsored Research Administration; Pam Ray, Director, Sponsored Research Administration; Stacey Patterson, Vice President for Research;
- (ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) of this provision have not participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; and
- (iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision.
- (c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

(End of Provision)

FAR 52.204-3 Taxpayer Identification (Oct 1998)

(a) Definitions

"Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member.

"Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a SocialSecurity Number or an Employer Identification Number.

(b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting contract is subject to the **FD PRACES** orting

requirements described in 175 de BANCquisition Cregulation of PAR 4.904 | Ind 1910/24/25 fusa Poggie 366 For to 36 A ish the information may result in a 31 percent reduction of payments otherwise due under the contract. (c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN. (d) Taxpayer Identification Number (TIN). * **✓** TIN on file. * \square TIN has been applied for. * TIN is not required because: * ☐ Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States; * Offeror is an agency or instrumentality of a foreign government; * Offeror is an agency or instrumentality of the Federal Government. (e) Type of organization. * □ sole proprietorship; * Partnership; * ☐ Corporate entity (not tax-exempt); * ☐ Corporate entity (tax-exempt); * Government entity (Federal, State, or local); * ☐ Foreign government; * International organization per 26 CFR 1.6049-4; * Other Public Institution of Higher Education (f) Common parent.

* 🗹 Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision.Name and TIN of common parent:Name: (blank)

TIN: (blank)

(End of Provision)

FAR 52.204-5 **Women-Owned Business (Other Than Small Business)**

(Oct 2014)

- (a) Definition. "Women-owned business concern," as used in this provision, means a concern that is at least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51 percent of its stock is owned by one or more women; and whose management and daily business operations are controlled by one or more women.
- (b) Representation. [Complete only if the offeror is a women-owned business concern and has not represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business Program Representations, of this solicitation.] The offeror represents that it \square is a women-owned business concern.

(End of Provision)

FAR 52.204-17 **Ownership or Control of Offeror**

(Aug 2020)

(a) Definition. As used in this provision--

Commercial and Government Entity (CAGE) code means--

(1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government

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(2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or by the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

Highest-level owner means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

Immediate owner means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

- (b) The Offeror represents that it **DOES NOT** have an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if applicable, paragraph (d) of this provision for each participant in the joint venture.*
- (c) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:

Immediate owner CAGE code: **(blank)**Immediate owner legal name: **(blank)**(Do not use a "doing business as" name)

Is the immediate owner owned or controlled by another entity? ☐ Yes ☐ No

(d) If the Offeror indicates "yes" in paragraph (c) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information:

Highest-level owner CAGE code: **(blank)**Highest-level owner legal name: **(blank)**(Do not use a "doing business as" name)

(End of Provision)

FAR 52.204-20 Predecessor of Offeror (Aug 2020)

(a) Definitions. As used in this provision--

"Commercial and Government Entity (CAGE) code" means--

- (1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government entity by unique location; or
- (2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary, depending on State law and specific circumstances.





(c) If the Offeror has indicated "is" in paragraph (b) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years (if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: (blank)

(or mark "Unknown").

Predecessor legal name: (blank)

(Do not use a "doing business as" name)

(End of Provision)

FAR 52.204-26	Covered Telecommunications Equipment or Services -	(Oct 2020)
FAR 52.204-20	Representation	(OCT 2020)

- (a) Definitions. As used in this provision, "covered telecommunications equipment or services" and "reasonable inquiry" have the meaning provided in the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.
- (b) Procedures. The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (https://www.sam.gov) for entities excluded from receiving federal awards for "covered telecommunications equipment or services."

(c)

- (1) Representation. The Offeror represents that it **② DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.
- (2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it, 😵 DOES NOT use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

(End of Provision)

Prohibition on Contracting with Inverted Domestic Corporations-FAR 52.209-2 (Nov 2015) Representation

- (a) Definitions. "Inverted domestic corporation" and "subsidiary" have the meaning given in the clause of this contract entitled Prohibition on Contracting with Inverted Domestic Corporations (52.209-10).
- (b) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.
- (c) Representation. the offeror represents that-
 - (1) It **S IS NOT** an inverted domestic corporation; and
 - (2) It S IS NOT a subsidiary of an inverted domestic corporation.

(End of Provision)

FAR 52.209-5 **Certification Regarding Responsibility Matters** (Aug 2020)

(a)

- (i) The Offeror and/or any of its Principals-
 - (A) **S ARE NOT** presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;
 - (B) **3 HAVE NOT**, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) contract or subcontract; violation of Federal or State antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property(if offeror checks "have", the offeror shall also see 52.209-7, if included in this solicitation);
 - (C) **S ARE NOT** presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.
 - (D) **S HAVE NOT**, within a three-year period preceding this offer, been notified of any delinquent Federal Taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.
 - (1) Federal taxes are considered delinquent if both of the following criteria apply:
 - (i) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
 - (ii) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(2) Examples:

- (i) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.
- (ii) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C. 6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.
- (iii) The taxpayer has entered into an installment agreement pursuant to

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the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.

- (iv) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under 11 U.S.C 362 (the Bankruptcy Code).
- (ii) The Offeror, **② HAS NOT**, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.
- (2) "Principal," for the purposes of this certification, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a division or business segment; and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.
- (b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.
- (d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- (e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

(End of Provision)

FAR 52.209-11

Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law

(Feb 2016)

- (a) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-
 - (1) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or
 - (2) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the integrated be



- (b) The Offeror represents that-
 - (1) It **S IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and
 - (2) It **3 IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

(End of Provision)

FAR 52.212-3

Offeror Representations and Certifications - Commercial Products and Commercial Services

(Nov 2021)

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.212-3(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.212-3(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

The Offeror shall complete only paragraph (b) of this provision if the Offeror has completed the annual representations and certifications electronically in the System for Award Management (SAM) accessed through https://www.sam.gov. If the Offeror has not completed the annual representations and certifications electronically, the Offeror shall complete only paragraphs (c) through (v) of this provision.

(a) Definitions. As used in this provision-

"Covered telecommunications equipment or services" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Economically disadvantaged women-owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127. It automatically qualifies as a women-owned small business eligible under the WOSB Program.

"Forced or indentured child labor" means all work or service-

- (1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or
- (2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.

"Highest-level owner" means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

"Immediate owner" means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

"Inverted domestic corporation", means a foreign incorporated entity that meets the definition of an inverted domestic corporation under 6 U.S.C. 395(b), applied in accordance with the rules and definitions of

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"Manufactured end product" means any end product in product and service codes (PSCs) 1000-9999, except-

- (1) PSC 5510, Lumber and Related Basic Wood Materials;
- (2) Product or Service Group (PSG) 87, Agricultural Supplies;
- (3) PSG 88, Live Animals;
- (4) PSG 89, Subsistence;
- (5) PSC 9410, Crude Grades of Plant Materials;
- (6) PSC 9430, Miscellaneous Crude Animal Products, Inedible;
- (7) PSC 9440, Miscellaneous Crude Agricultural and Forestry Products;
- (8) PSC 9610, Ores;
- (9) PSC 9620, Minerals, Natural and Synthetic; and
- (10) PSC 9630, Additive Metal Materials.

"Place of manufacture" means the place where an end product is assembled out of components, or otherwise made or processed from raw materials into the finished product that is to be provided to the Government. If a product is disassembled and reassembled, the place of reassembly is not the place of manufacture.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Reasonable inquiry" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007 (Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

- (1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;
- (2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;
- (3) Consist of providing goods or services to marginalized populations of Sudan;
- (4) Consist of providing goods or services to an internationally recognized peacekeeping force or humanitarian organization;
- (5) Consist of providing goods or services that are used only to promote health or education; or
- (6) Have been voluntarily suspended.

"Sensitive technology"-

- (1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-
 - (i) To restrict the free flow of unbiased information in Iran; or

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(2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).

"Service - disabled veteran - owned small business concern"

- (1) Means a small business concern-
 - (i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans; and
 - (ii) The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.
- (2) Service-disabled veteran means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

- (1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria in 13 CFR part 121 and size standards in this solicitation.
- (2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern", consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that-

- (1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-
 - (i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States; and
 - (ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and
- (2) The management and daily business operations of which are controlled (as defined at 13.CFR 124.106) by individuals, who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Subsidiary" means an entity in which more than 50 percent of the entity is owned

- (1) Directly by a parent corporation; or
- (2) Through another subsidiary of a parent corporation.

"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary, depending on State law and specific circumstances.

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- (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127), means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States.

"Women-owned small business concern" means a small business concern-

- (1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

(b)

- (1) Annual Representations and Certifications. Any changes provided by the Offeror in paragraph (b)(2) of this provision do not automatically change the representations and certifications in SAM.
- (2) The Offeror has completed the annual representations and certifications electronically in SAM accessed through https://www.sam.gov. After reviewing SAM information, the Offeror verifies by submission of this offer that the representations and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications-Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), at the time this offer is submitted and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs ________.

 [Offeror to identify the applicable paragraphs at (c) through (v) of this provision that the offeror has completed for the purposes of this solicitation only, if any.

These amended representation(s) and/or certification(s) are also incorporated in this offer and are current, accurate, and complete as of the date of this offer.

Any changes provided by the offeror are applicable to this solicitation only, and do not result in an update to the representations and certifications posted electronically on SAM.]

(c) Offerors must complete the following representations when the resulting contract is to be performed inside the United States or its outlying areas. Check all that apply.

If no NAICS table is displayed, this registrant may not be considered a small business.

- (1) *Small business concern. The offeror represents as part of its offer that it, **② IS NOT** a small business concern.
- (2) *Veteran-owned small business concern. The offeror represents as part of its offer that it, **② IS NOT** a veteran-owned small business concern.
- (3) *Service-disabled veteran-owned small business concern. The offeror represents as part of its offer that it, **S IS NOT** a service-disabled veteran-owned small business concern.
- (4) Small disadvantaged business concern. The offeror represents, that it ☐ is, ☐ is not a small disadvantaged business concern as defined in 13 CFR 124.1002.
- (5) *Women-owned small business concern. The offeror represents that it, **♥ IS NOT** a women-owned small business concern.

women-owned small business concern in paragraph (c)(5) of this provision] The offeror represents that: (i) It ☐ is, ☐ is not a WOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(6)(i) of this provision is accurate in reference to the WOSB concern or concerns that are participating in the joint venture. [The offeror shall enter the name or names of the WOSB concern or concerns that are participating in the joint venture:] Each WOSB concern participating in the joint venture shall submit a separate signed copy of the WOSB representation. (7) **Economically disadvantaged women-owned small business (EDWOSB) concern. [Complete only if the offeror represented itself as a WOSB concern eligible under the WOSB Program in (c)(6) of this provision.] The offeror represents that: (i) It ☐ is, ☐ is not an EDWOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It ☐ is, ☐ is not a joint venture that complies withthe requirements of 13 CFR part 127, and the representation in paragraph (c)(7)(i) of this provision is accurate for each EDWOSB concern participating in the joint venture. [The offeror shall enter the name or names of the EDWOSB concern and other small businesses that are participating in the joint venture: .] Each EDWOSB concern participatingin the joint venture shall submit a separate signed copy of the EDWOSB representation. Note: Complete paragraphs (c)(8) and (c)(9) only if this solicitation is expected to exceed the simplified acquisition threshold. (8) Women-owned business concern (other than small business concern). [Complete only if the offeror is a women-owned business concern and did not represent itself as a small business concern in paragraph (c)(1)

- of this provision.] The offeror represents that it \square is a women-owned business concern.
- (9) Tie bid priority for labor surplus area concerns. If this is an invitation for bid, small business offerors may identify the labor surplus areas in which costs to be incurred on account of manufacturing or production (by offeror or first-tier subcontractors) amount to more than 50 percent of the contract price: State Eligible Labor Surplus: (blank) Civil Jurisdictions Included: (blank)
- (10) HUBZone small business concern. The offeror represents as part of its offer, that-
 - (i) It 🐼 IS NOT a HUBZone small business concern listed, on the date of this representation, on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration, and no material change in ownership and control, principal office, or HUBZone employee percentage has occurred since it was certified in accordance with 13 CFR part 126; and
 - (ii) It **3 IS NOT** a HUBZone joint venture that complies with the requirements of 13 CFR part 126, and the representation in paragraph (c)(11)(i) of this provision is accurate for each HUBZone small business concern participating in the HUBZone joint venture.

[The offeror shall enter the names of each of the HUBZone small business concerns participating in the HUBZone joint venture: .] Each HUBZone small business concern participating in the joint venture shall submit a separate signed copy of the HUBZone representation.

(d) Representations required to implement provisions of Executive Order 11246-

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- (i) It **HAS** participated in a previous contract or subcontract subject to the Equal Opportunity clause of this solicitation; and
- (ii) It **✓ HAS** filed all required compliance reports.
- (2) Affirmative Action Compliance. The offeror represents that-
 - (i) It AS DEVELOPED AND HAS ON FILE, It at each establishment, affirmative action programs required by rules and regulations of the Secretary of Labor (41 cfr parts 60-1 and 60-2), or
 - (ii) It \square has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.
- (e) Certification Regarding Payments to Influence Federal Transactions (31 U.S.C. 1352).(Applies only if the contract is expected to exceed \$150,000.) By submission of its offer, the offeror certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress or an employee of a Member of Congress on his or her behalf in connection with the award of any resultant contract. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.
- (f) Buy American Certificate. (Applies only if the clause at Federal Acquisition Regulation (FAR)52.225-1, Buy American-Supplies, is included in this solicitation.)

(1)

- (i) The Offeror certifies that each end product, except those listed in paragraph (f)(2) of this provision, is a domestic end product.
- (ii) The Offeror shall list as foreign end products those end products manufactured in the United States that do not qualify as domestic end products.
- (iii) The terms "domestic end product," "end product," "foreign end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Supplies."
- (2) Foreign End Products: (blank)
- (3) The Government will evaluate offers in accordance with the policies and procedures of FAR Part 25.

(g)

(1) Buy American-Free Trade Agreements-Israeli Trade Act Certificate. (Applies only if the clause at FAR52.225-3, Buy American-Free Trade Agreements-Israeli Trade Act, is included in this solicitation.)

(i)

- (A) The Offeror certifies that each end product, except those listed in paragraph (g)(1)(ii) or
- (iii) of this provision, is a domestic end product.
 - (B) The terms "Bahrainian, Moroccan, Omani, Panamanian, or Peruvian end product," "domestic end product," "end product," "foreign end product," "Free Trade Agreement country," "Free Trade Agreement country end product," "Israeli end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act."
- (iii) The offeror shall list those supplies that are foreign end products (other than those list 1003449

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American-Free Trade Agreements-Israeli Trade Act." The offeror shall list as other foreign end products those end products manufactured in the United States that do not qualify as domestic end products.

Other Foreign End Products: (blank)

- (iv) The Government will evaluate offers in accordance with the policies and procedures of FAR Part 25.
- (2) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate I. If Alternate I to the clause at FAR 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:
- (g)(1)(ii) The offeror certifies that the following supplies are Canadian end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act": Canadian End Products: **(blank)**
- (3) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate II. If Alternate II to the clause at FAR 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:
- (g)(1)(ii) The offeror certifies that the following supplies are Canadian end products or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act": Canadian or Israeli End Products: **(blank)**
- (4) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate III. If Alternate III to the clause at 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:
- (g)(1)(ii) The offeror certifies that the following supplies are Free Trade Agreement country end products (other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian end products) or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":

Free Trade Agreement Country End Products (Other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian End Products) or Israeli End Products: (**blank**)

- (5) Trade Agreements Certificate. (Applies only if the clause at FAR 52.225-5, Trade Agreements, is included in this solicitation.)
 - (i) The offeror certifies that each end product, except those listed in paragraph (g)(5)(ii) of this provision, is a U.S.-made or designated country end product, as defined in the clause of this solicitation entitled "Trade Agreements."
 - (ii) The offeror shall list as other end products those end products that are not U.S.-made or designated country end products.

Other End Products: (blank)

- (iii) The Government will evaluate offers in accordance with the policies and procedures of FAR Part25. For line items covered by the WTO GPA, the Government will evaluate offers of U.S.-made or designated country end products without regard to the restrictions of the Buy American statute. The Government will consider for award only offers of U.S.-made or designated country end products unless the Contracting Officer determines that there are no offers for such products or that the offers for such products are insufficient to fulfill the requirements of the solicitation.
- (h) Certification Regarding Responsibility Matters (Executive Order 12689). (Applies only if the contract value is expected to exceed the simplified acquisition threshold.) The offeror certifies, to the best of its knowledge and belief, that the offeror and/or any of its principals-





- (2) SHAVE NOT, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a Federal, state or local government contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property;
- (3) **SARE NOT** presently indicted for, or otherwise criminally or civilly charged by a Government entity with, commission of any of these offenses enumerated in paragraph (h)(2) of this clause; and
- (4) **EXECUTE** HAVE NOT within a three-year period preceding this offer, been notified of any delinquent Federal taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.
 - (i) Taxes are considered delinquent if both of the following criteria apply:
 - (A) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
 - (B) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(ii) Examples:

- (A) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court Review, this will not be a final tax liability under the taxpayer has exercised all judicial appeal rights.
- (B) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C.6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the tax payer has exercised all judicial appeal rights.
- (C) The taxpayer has entered into an installment agreement pursuant to I.R.C.6159. The taxpayer is making timely payments and is in full compliance with the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.
- (D) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under II U. S. C 362 (the Bankruptcy Code).
- (i) Certification Regarding Knowledge of Child Labor for Listed End Products (Executive Order 13126). [The Contracting Officer must list in paragraph (i)(1) any end products being acquired under this solicitation that are included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, unless excluded at 22.1503(b).]
 - (1) Listed end products.



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Bamboo	Burma
Beans (green, soy, yellow)	Burma
Brazil Nuts/Chestnuts	Bolivia
Bricks	Afghanistan, Burma, China, India, Nepal, Pakistan
Carpets	Nepal, Pakistan
Cattle	South Sudan
Cassiterite	Democratic Republic of Congo
Coal	Pakistan
Coca (stimulant plant)	Colombia
Cocoa	Cote d'Ivoire, Nigeria
Coffee	Cote d'Ivoire
Coltan	Democratic Republic of Congo
Cotton	Benin, Burkina Faso, China, Tajikistan, Uzbekistan
Cottonseed (hybrid)	India
Diamonds	Sierra Leone
Dried Fish	Bangladesh
Electronics	China
Embroidered Textiles (zari)	India, Nepal
Fish	Ghana
Garments	Argentina, India, Thailand, Vietnam
Gold	Burkina Faso, Democratic Republic of Congo
Granite	Nigeria
Gravel (crushed stones)	Nigeria
Pornography	Russia
Rice	Burma, India, Mali
Rubber	Burma
Shrimp	Thailand
Stones	India, Nepal
Sugarcane	Bolivia, Burma
Teak	Burma
Textiles (hand-woven)	Ethopia
Tilapia (fish)	Ghana
Tobacco	Malawi
Toys	China
Wolframite	Democratic Republic of Congo

- (2) Certification. [If the Contracting Officer has identified end products and countries of origin in paragraph (i)(1) of this provision, then the offeror must certify to either (i)(2)(i) or (i)(2)(ii) by checking the appropriate block.]
 - (i) The offeror will not supply any end product listed in paragraph (i)(1) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product.
 - (ii) ☐ The offeror may supply an end product listed in paragraph (i)(1) of this provision tha **ED**a**603452**





certifies that it has made a good faith effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture any such end product furnished under this contract. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

- (j) Place of Manufacture(Does not apply unless the solicitation is predominantly for the acquisition of manufactured end products.) For statistical purposes only, the offeror shall indicate whether the place of manufacture of the end products it expects to provide in response to this solicitation is predominantly-
 - (1) In the United States (Check this box if the total anticipated price of offered end products manufactured in the United States exceeds the total anticipated price of offered end products manufactured outside the United States); or
 - (2) Outside the United States.

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- (k) Certificates regarding exemptions from the application of the Service Contract Labor Standards (Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services.) [The contracting officer is to check a box to indicate if paragraph (k)(1) or (k)(2) applies.]
 - (1) Maintenance, calibration, or repair of certain equipment as described in FAR 22.1003-4(c)(1). The offeror **© DOES NOT** certify that __
 - (i) The items of equipment to be serviced under this contract are used regularly for other than Governmental purposes and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontract) in substantial quantities to the general public in the course of normal business operations;
 - (ii) The services will be furnished at prices which are, or are based on, established catalog or market prices (see FAR 22.1003-4(c)(2)(ii)) for the maintenance, calibration, or repair of such equipment; and
 - (iii) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract will be the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.
 - (2) Certain services as described in FAR 22.1003-4(d)(1). The offeror, ② DOES NOT certify that ___
 - (i) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;
 - (ii) The contract services will be furnished at prices that are, or are based on, established catalog or market prices (see FAR 22.1003-4(d)(2)(iii));
 - (iii) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and
 - (iv) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract is the same as that used for these employees and equivalent employees servicing commercial customers.
 - (3) If paragraph (k)(1) or (k)(2) of this clause applies ____
 - (i) If the offeror does not certify to the conditions in paragraph (k)(1) or (k)(2) and the Contracting

 Officer did not attach a Service Contract Labor Standards wage determination to the solic ED: 003453

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- (ii) The Contracting Officer may not make an award to the offeror if the offeror fails to execute the certification in paragraph (k)(1) or (k)(2) of this clause or to contact the Contracting Officer as required in paragraph (k)(3)(i) of this clause.
- (I) Taxpayer Identification Number (TIN) (26 U.S.C. 6109, 31 U.S.C. 7701). (Not applicable if the offeror is required to provide this information to SAM to be eligible for award.)
 - (1) All offerors must submit the information required in paragraphs (l)(3) through (l)(5) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the Internal Revenue Service (IRS).
 - (2) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the

payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with
IRS records to verify the accuracy of the offeror's TIN.
(3) Taxpayer Identification Number (TIN).
* ☑ TIN on file.
* ☐ TIN has been applied for.
*TIN is not required because:
* ☐ Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income
effectively connected with the conduct of a trade or business in the United States and does not have an office
or place of business or a fiscal paying agent in the United States;
* ☐ Offeror is an agency or instrumentality of a foreign government;
* ☐ Offeror is an agency or instrumentality of the Federal Government.
(4) Type of organization.
*□sole proprietorship;
*□Partnership;
* ☐ Corporate entity (not tax-exempt);

- * ☐ Corporate entity (tax-exempt); * ☐ Government entity (Federal, State, or local); * ☐ Foreign government;
- * International organization per 26 CFR 1.6049-4;
- * Other Public Institution of Higher Education
- (5) Common parent.
- * ☑ Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision.
- * Name: (blank) TIN: (blank)
- (m) Restricted business operations in Sudan. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.
- (n) Prohibition on Contracting with Inverted Domestic Corporations.
 - (1) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.
 - (2) Representation. the offeror represents that-
 - (i) It S IS NOT an inverted domestic corporation; and

Case 325nor-Oslusidia By Atlan in Decelular and the Case or at Filed 06/24/25 Page 283 of 364



- (o) Prohibition on contracting with entities engaging in certain activities or transactions relating to Iran.
 - (1) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.
 - (2) Representation and Certifications. Unless a waiver is granted or an exception applies as provided in paragraph (o)(3) of this provision, by submission of its offer, the offeror-
 - (i) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran;
 - (ii) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act; and
 - (iii) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx).
 - (3) The representation and certification requirements of paragraph (o)(2) of this provision do not apply if-
 - (i) This solicitation includes a trade agreements certification (e.g., 52.212-3(g) or a comparable agency provision); and
 - (ii) The offeror has certified that all the offered products to be supplied are designated country end products.
- (p) Ownership or Control of Offeror. (Applies in all solicitations when there is a requirement to be registered in SAM or a requirement to have a unique entity identifier in the solicitation.)
 - (1) The Offeror represents that it **DOES NOT** have an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if applicable, paragraph (d) of this provision for each participant in the joint venture.*

(2) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:
Immediate owner CAGE code: (blank)
Immediate owner legal name: (blank)
(Do not use a "doing business as" name)
Is the immediate owner owned or controlled by another entity? ☐ Yes ☐ No
(3) If the Offeror indicates "yes" in paragraph (p)(2) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information: Highest-level owner CAGE code: Highest-level owner legal name: (blank) (Do not use a "doing business as" name)

- (q) Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law.
 - (1) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L.113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-





remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or

- (ii) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the interests of the Government.
- (2) The Offeror represents that-
 - (i) It **② IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and
 - (ii) It **S IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.
- (r) Predecessor of Offeror. (Applies in all solicitations that include the provision at 52.204-16, Commercial and Government Entity Code Reporting.)
 - (1) The Offeror represents that it **S IS NOT** a successor to a predecessor that held a Federal contract or grant within the last three years.
 - (2) If the Offeror has indicated "is" in paragraph (r)(1) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years (if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: (blank)

(or mark "Unknown").

Predecessor legal name: (blank)

(Do not use a "doing business as" name)

- (s) Reserved.
- (t) Public Disclosure of Greenhouse Gas Emissions and Reduction Goals. Applies in all solicitations that require offerors to register in SAM (12.301(d)(1)).
 - (1) This representation shall be completed if the Offeror received \$7.5 million or more in contract awards in the prior Federal fiscal year. The representation is optional if the Offeror received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.
 - (2) Representation. [Offeror to check applicable block(s) in paragraph (t)(2)(i) and (ii)].
 - (i) The Offeror (itself or through its immediate owner or highest-level owner) **DOES** publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.
 - (ii) The Offeror (itself or through its immediate owner or highest-level owner) **② DOES NOT** publicly disclose a quantitative greenhouse gas emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.

CAROA Bilbaciy wolls. The Web lite in the October The Total Report of the Sawn Will be the 6/24/25 gnized agree 1364 greenhouse gas emissions reporting program.



(3) If the Offeror checked "does" in paragraphs (t)(2)(i) or (t)(2)(ii) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported: **https:**

//ghgdata.epa.gov/ghgp/service/facilityDetail/2021?id=1005785&ds=E&et=&popup=true (blank)

(u)

- (1) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.
- (2) The prohibition in paragraph (u)(1) of this provision does not contravene requirements applicable to Standard Form 312 (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartmented Information Nondisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.
- (3) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).
- (v) Covered Telecommunications Equipment or Services Representation. Section 889(a)(1) and Section 889(a)(1)(B) of Public Law 115-232.
 - (1) The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (https://www.sam.gov) for entities excluded from receiving federal awards for "covered telecommunications equipment or services".
 - (2) The Offeror represents that-
 - (i) It **② DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.
 - (ii) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it, **② DOES NOT** use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

Alternate I (Oct 2014)

As prescribed in 12.301(b)(2)	, add the following paragrapi	n (c)(11) to the basic provision:
(4.4) (6		J J J

(11) (Complete if the offeror has represented itself as disadvantaged in paragraph (c)(4) of the	nis provision.)
☐ Black American.	
☐ Hispanic American.	
☐ Native American (American Indians, Eskimos, Aleuts, or Native Hawaiians).	ED 003457

□ CASSA - Ba2thc CAVIDATA (parch wit Dorgins) with 46 mas, Thatiled Mady ad 25 dones agong a for 364 Brunei, Japan, China, Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, The Philippines, Republic of Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu, or Nauru). □ Subcontinent Asian (Asian-Indian) American (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands, or Nepal). □ Individual/concern, other than one of the preceding.

(End of Provision)

FAR 52.214-14 Place of Pe

Place of Performance-Sealed Bidding

(Apr 1985)

- (a) The bidder, in the performance of any contract resulting from this solicitation, , ** DOES NOT INTEND [check applicable box] to use one or more plants or facilities located at a different address from the address of the bidder as indicated in this bid.
- (b) If the bidder checks "intends" in paragraph (a) of this provision, it shall insert in the spaces provided below the required information:

Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

(End of Provision)

FAR 52.215-6 Place of Performance

(Oct 1997)

- (a) The offeror or respondent, in the performance of any contract resulting from this solicitation, **© DOES NOT INTEND** [check applicable block] to use one or more plants or facilities located at a different address from the address of the offeror or respondent as indicated in this proposal or response to request for information.
- (b) If the offeror or respondent checks "intends" in paragraph (a) of this provision, it shall insert in the following spaces the required information:

Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

(End of Provision)

FAR 52.219-1

Small Business Program Representations

(Nov 2020)

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.219-1(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.219-1(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

(a) Definitions. As used in this provision-

"Economically disadvantaged women-owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127. It automatically qualifies as a women-owned small business concern eligible under the WOSB Program.

"Service-disabled veteran-owned small business concern"

- (1) Means a small business concern-
 - (i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is 003458



- (ii) The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.
- (2) "Service-disabled veteran" means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

- (1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria in 13 CFR part 121 and size standards in this solicitation.
- (2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern," consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that

- (1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-
 - (i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States, and
 - (ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and
- (2) The management and daily business operations of which are controlled (as defined at 13 CFR 124.106) by individuals who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Veteran-owned small business concern" means a small business concern-

- (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business concern" means a small business concern-

- (1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127), means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States.

(b)

- (1) The North American Industry Classification System (NAICS) code for this acquisition is See Note.*
- (2) The small business size standard is See Note.

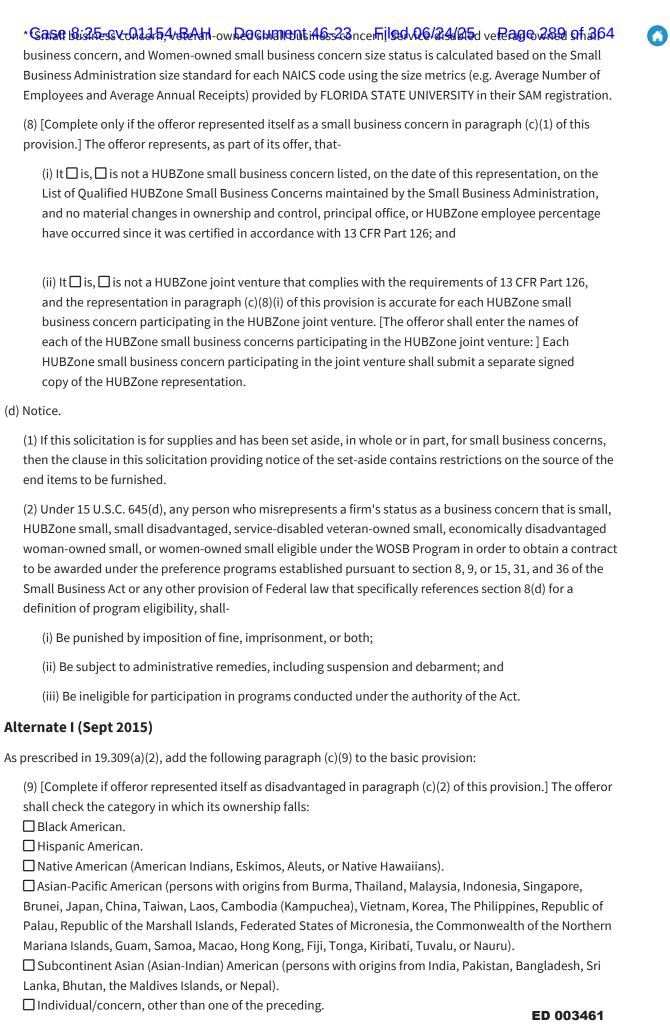


(3) The Mail Sushing 1 Sizest Molard to December of the Miles of the Mail Sushing 1 Sizes Mail Sushin 1 Sizes Mail construction or service contract, but which proposes to furnish a product which it did not itself manufacture, is 500 employees.

(c) Representations

If no NAICS table is displayed, this registrant may not be considered a small business.

(1) ** The offeror represents as part of its offer that it, SIS NOT a small business concern (see below). (2) ** [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, that it □ is, □ is not, a small disadvantaged business concern as defined in 13 CFR 124.1002. (3) ** [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a women-owned small business concern. (See Below) (4) ** Women-owned small business (WOSB) concern eligible under the WOSB Program. [Complete only if the offeror represented itself as a women-owned small business concern in paragraph (c)(3) of this provision.] The offeror represents as part of its offer that-(i) It ☐ is, ☐ is not a WOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It □ is, □ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(4)(i) of this provision is accurate for each WOSB concern eligible under the WOSB Program participating in the joint venture. [The offeror shall enter the name or names of the WOSB concern eligible under the WOSB Program and other small businesses that are participating in the joint venture: .] Each WOSB concern participating in the joint venture shall submit a separate signed copy of the WOSB representation. (5) ** Economically disadvantaged women-owned small business (EDWOSB) concern. [Complete only if the offeror represented itself as a women-owned small business concern eligible under the WOSB Program in (c)(4) of this provision.] The offeror represents as part of its offer that-(i) It ☐ is, ☐ is not an EDWOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and (ii) It ☐ is, ☐ is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(5)(i) of this provision is accurate for each EDWOSB concern participating in the joint venture. [The offeror shall enter the name or names of the EDWOSB concern and other small businesses that are participating in the joint venture: .] Each EDWOSB concern participating in the joint venture shall submit a separate signed copy of the EDWOSB representation. (6) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a veteran-owned small business concern. (7) **[Complete only if the offeror represented itself as a veteran-owned small business concern in paragraph (c)(6) of this provision.] The offeror represents as part of its offer that it \square is, \square is not a service-disabled veteran-owned small business concern. (See Below) *If you are responding to a Government solicitation for supplies or services under a NAICS code not listed in paragraph (b) of this certification, you must provide this certification directly to the Contracting Officer.



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- (a) This provision applies to small business concerns only
- (b) The bidder's status as a labor surplus area (LSA) concern may affect entitlement to award in case of tie bids. If the bidder wishes to be considered for this priority, the bidder must identify, in the following space, the LSA in which the costs to be incurred on account of manufacturing or production (by the bidder or the first-tier subcontractors) amount to more than 50 percent of the contract price.
- (c) Failure to identify the labor surplus areas as specified in paragraph (b) of this provision will preclude the bidder from receiving priority consideration. If the bidder is awarded a contract as a result of receiving priority consideration under this provision and would not have otherwise received award, the bidder shall perform the contract or cause the contract to be performed in accordance with the obligations of an LSA concern.

FAR 52.222-18	Certification Regarding Knowledge of Child Labor for Listed End	(Feb 2021)
FAR 32.222-10	Products	(FED 2021)

(a) Definition:

"Forced or indentured child labor" means all work or service-

- (1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or
- (2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.
- (b) Listed end products. The following end product(s) being acquired under this solicitation is (are) included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, identified by their country of origin. There is a reasonable basis to believe that listed end products from the listed countries of origin may have been mined, produced, or manufactured by forced or indentured child labor.

Listed End Products	Listed Country of Origin	
Bamboo	Burma	
Beans (green, soy, yellow)	Burma	
Brazil Nuts/Chestnuts	Bolivia	
Bricks	Afghanistan, Burma, China, India, Nepal, Pakistan	
Carpets	Nepal, Pakistan	
Cattle	South Sudan	
Cassiterite	Democratic Republic of Congo	
Coal	Pakistan	
Coca (stimulant plant)	Colombia	
Cocoa	Cote d'Ivoire, Nigeria	
Coffee	Cote d'Ivoire	
Coltan	Democratic Republic of Congo	
Cotton	Benin, Burkina Faso, China, Tajikistan, Uzbekistan	
Cottonseed (hybrid)	India	
Diamonds	Sierra Leone	
Dried Fish	Bangladesh	ED 003462

Case stead End products - BAH	Document 46-23 Listled Collins Page 291 of 364
Electronics	China
Embroidered Textiles (zari)	India, Nepal
Fish	Ghana
Garments	Argentina, India, Thailand, Vietnam
Gold	Burkina Faso, Democratic Republic of Congo
Granite	Nigeria
Gravel (crushed stones)	Nigeria
Pornography	Russia
Rice	Burma, India, Mali
Rubber	Burma
Shrimp	Thailand
Stones	India, Nepal
Sugarcane	Bolivia, Burma
Teak	Burma
Textiles (hand-woven)	Ethopia
Tilapia (fish)	Ghana
Tobacco	Malawi
Toys	China
Wolframite	Democratic Republic of Congo

- (c) Certification. The Government will not make award to an offeror unless the offeror, by checking the appropriate block, certifies to either paragraph (c)(1) or paragraph (c)(2) of this provision
 - (1) ✓ The offeror will not supply any end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in a corresponding country as listed for that end product.
 - (2) The offeror may supply an end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product. The offeror certifies that it has made a good faith effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture such end product. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

FAR 52.222-22 Previous Contracts and Compliance Reports (Feb 1999)

The offeror represents that-

- (a) It **HAS** participated in a previous contract or subcontract subject the Equal Opportunity clause of this solicitation;
- (b) It HAS filed all required compliance reports; and
- (c) Representations indicating submission of required compliance reports, signed by proposed subcontractors, will be obtained before subcontract awards.

(End of Provision)

FAR 52.222-25 Affirmative Action Compliance (Apr 1984)

ED 003463



- (a) It HAS DEVELOPED AND HAS ON FILE, at each establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor (41 CFR 60-1 and 60-2); or
- (b) It \square has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

	Exemption from Application of the Service Contract Labor	
FAR 52.222-48	Standards to Contracts for Maintenance, Calibration, or Repair of	(May 2014)
	Certain Equipment-Certification	

(a) The offeror shall check the following certification: Certification

The offeror **ODES NOT CERTIFY** that -

- (1) The items of equipment to be serviced under this contract are used regularly for other than Government purposes, and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontractor) in substantial quantities to the general public in the course of normal business operations;
- (2) The services will be furnished at prices which are, or are based on, established catalog or market prices for the maintenance, calibration, or repair of equipment.
 - (i) An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public.
 - (ii) An "established market price" is a current price, established in the usual course of trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror; and
- (3) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract are the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.
- (b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(c)(3) that the Service Contract Labor Standards statute-
 - (1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or
 - (2) Will apply to this offeror, then the clause at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, in this solicitation will not be included in any resultant contract awarded to this offeror, and the offeror may be provided an opportunity to submit a new offer on that basis.
- (c) If the offeror does not certify to the conditions in paragraph (a) of this provision-
 - (1) The clause in this solicitation at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, will not be included in any resultant contract awarded to this offeror; and
 - (2) The offeror shall notify the Contracting Officer as soon as possible, if the Contracting Officer biggs 464

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(d) The Contracting Officer may not make an award to the offeror, if the offeror fails to execute the certification in paragraph (a) of this provision or to contact the Contracting Officer as required in paragraph (c) of this provision.

(End of Provision)

FAR 52.222-52

Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Certification

(May 2014)

(a) The offeror shall check the following certification:

Certification

The offeror **② DOES NOT** certify that -

- (1) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;
- (2) The contract services are furnished at prices that are, or are based on, established catalog or market prices. An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public. An "established market price" is a current price, established in the usual course of ordinary and usual trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror;
- (3) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and
- (4) The offeror uses the same compensation (wage and fringe benefits) plan for all service employees performing work under the contract as the offeror uses for these employees and for equivalent employees servicing commercial customers.
- (b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(d)(3) that the Service Contract Labor Standards statute-
 - (1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or
 - (2) Will apply to this offeror, then the clause at FAR 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, in this solicitation will not be included in any resultant contract awarded to this offer, and the offeror may be provided an opportunity to submit a new offer on that basis.
- (c) If the offeror does not certify to the conditions in paragraph (a) of this provision-
 - (1) The clause of this solicitation at 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, will not be included in any resultant contract to this offeror; and
 - (2) The offeror shall notify the Contracting Officer as soon as possible if the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation.

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(d) The Contracting Officer as required in paragraph (c) of this provision.



(End of Provision)

FAR 52.223-4 Recovered Material Certification (May 2008)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.223-9 Estimate of Percentage of Recovered Material Content for EPA
(May 2008)

Designated Items (Alternate I)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.223-22 Public Disclosure of Greenhouse Gas Emissions and Reduction
Goals-Representation (Dec 2016)

As prescribed in 23.804(b), insert the following provision:

Public Disclosure of Greenhouse Gas Emissions and Reduction Goals- Representation (Dec 2016)

- (a) This representation shall be completed if the Offeror received \$7.5 million or more in Federal contract awards in the prior Federal fiscal year. The representation is optional if the Offeror received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.
- (b) Representation [Offeror is to check applicable blocks in paragraphs (b)(1) and (2).]
 - (1) The Offeror (itself or through its immediate owner or highest-level owner) **DOES**, publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.
 - (2) The Offeror (itself or through its immedaite owner or highest-level owner), ODES NOT publicly disclose a quantitative greenhouse emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.
 - (3) A publicly accessible Web site includes the Offeror's own Web site or a recognized, third-party greenhouse gas emissions reporting program.
- (c) If the Offeror checked "does" in paragraphs (b)(1) or (b)(2) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported: https://ghgdata.epa.gov/ghgp/service/facilityDetail/2021?id=1005785&ds=E&et=&popup=true (blank)

(End of Provision)

FAR 52.225-2 Buy American Certificate (Feb 2021)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

ED 003466 (Feb 2021)



FAR 52.225-6 Trade Agreements Certificate (Feb 2021)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

FAR 52.226-2	Historically Black College or University and Minority Institution	(Oct 2014)
	Representation	(000 2014)

(a) Definitions. As used in this provision-

"Historically black college or university" means an institution determined by the Secretary of Education to meet the requirements of 34 CFR 608.2.

"Minority institution" means an institution of higher education meeting the requirements of Section 365(3) of the Higher Education Act of 1965 (20 U.S.C. 1067k), including a Hispanic-serving institution of higher education, as defined in Section 502(a) of the Act (20 U.S.C. 1101a).

- (b) Representation. The offeror represents that it-
- **℧ IS NOT** a historically black college or university;
- **S** IS **NOT** a minority institution.

(End of Provision)

FAR 52.227-15	Representation of Limited Rights Data and Restricted Computer	(Dec 2007)
FAR 32.221-13	Software	(Dec 2001)

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

Chris Gilmer, Ph.D. (Pronouns: he, him, his)						
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CAREER OVERVIEW AND GOALS

With 25 years of upwardly mobile leadership experience in higher education and private sector administration, grant writing and federal programs administration, community mobilization and coalition building, pre-K through adult educational consulting, training and technical assistance provision, undergraduate and graduate teaching face-to-face and online, academic writing and publications management, public relations and journalism, faculty development, curriculum development, project evaluation, staff supervision and comprehensive human resources management, fundraising and fiscal management, I have proven myself valuable to all of my employers and am now searching, not randomly for a job, but deliberately for a leadership path that will challenge me to use my passions for education, community-building, workforce development, and equity to effect positive social change through the medium of education.

I currently serve as President and Professor Humanities at West Virginia University at Parkersburg. I have served as Executive Director/Chief Operating Officer of Alcorn State University's Vicksburg Campus, Vice President for Academic and Sponsored Programs at a nonprofit agency, and Vice President for Academic Affairs at Adams State University. I was Director of Online Education for Alcorn's three-campus system and Professor of English. Alcorn is the oldest public land-grant Historically Black University (HBCU) in the United States. Adams is the oldest federally-designated Hispanic-Serving Institution (HSI) in Colorado. Prior to and concurrent with my work at Alcorn, I was Core Professor and Chair/Academic Coordinator, Department of Undergraduate Writing, at Walden University and served as an adjunct faculty member at East Central Community College and Hinds Community College. Having secured in excess of \$75 million as a grant writer, I have served as senior grant writer, departmental chair, and founding director of the Center for Faculty Development.

Having supervised staffs of 400 people and multi-million-dollar budgets, I was principal investigator/project director of the first Southeast Center for the Application of Prevention Technologies (CAPT) and the first chair and CEO of the National CAPT Network. I provided national leadership toward project start-up, implementation, and evaluation of this network of training and technical assistance centers funded by the U.S. Department of Health and Human Services to serve all U.S. states and jurisdictions, including building and nurturing a nationwide remotely-managed team in five satellite locations. In the private sector, I have management experience at the level of president, acting president, senior vice president, associate executive director, project director, and principal investigator.

SKILLS OVERVIEW

Twenty-five years of experience in higher education as a senior executive, professor, trainer, technical assistance provider, grant writer, evaluator, and editor; 20 years consulting experience providing training and technical assistance through the U.S. Department of Education's regional comprehensive center and educational labs networks and other venues on topics ranging from leadership to grant writing and curriculum development to cultural diversity, team building, best practices in teaching and retaining first-generation students, developing culturally relevant pedagogy, differentiated instruction, developmental education, and online education

Twenty-five years of experience as an administrator in higher education and private sector; broad understanding of all major management functions of local and remote staffs including staff hiring, supervision, evaluation, and termination; budget planning and management; human resources functions; fundraising; and marketing/public relations

Published editor, writer, and master communicator in both written and verbal forms; confident and highly skilled trainer, and public speaker

Servant leader, leading by example and earning respect from employees, supervisors, clients, and funders for fairness, vision, inclusiveness, and integrity

Proven consensus builder and master group facilitator capable of engaging and molding disparate individuals and groups into a well-served, well-satisfied constituency

Successful proposal developer, grant writer, and fundraiser leading and serving on teams that have secured more than \$75 million in funding for clients nationwide

Skilled strategic planner and priority setter, sharing success with every member of my team and accepting failure as my bottom-line responsibility, turning any failure into a "teachable moment" and ultimately repurposing it into success in an alternate form

Consistently receive student evaluations among the highest in the departments that I have served and excellent evaluations from all supervisors

EDUCATION

University of Southern Mississippi, Hattiesburg, MS, Ph.D. in English, 1994, emphasis in writing, 4.0 GPA

Mississippi College, Clinton, MS, M.A. in English, 1989, emphasis in writing, 3.95 GPA

University of Southern Mississippi, Hattiesburg, MS, B.S. in English/journalism, 1987, 3.7 GPA

East Central Community College, Decatur, MS, A.A. in Liberal Arts, 1985, 3.95 GPA

PROFESSIONAL EXPERIENCE

West Virginia University at Parkersburg, Parkersburg, WV, July 1, 2018-Present; President and Professor of Humanities

West Virginia University at Parkersburg is a free-standing, independently accredited hybrid institution, the only college in West Virginia that is fully a community college and a bachelor's degree-granting university, maintaining strong and traditional ties with West Virginia University, the state's flagship, but not a regional campus of the flagship. WVUP enrolls 3,000 students in academic credit-bearing classes working toward an associate or bachelor's degree and additional students in workforce development programs working toward a non-degree certification or credential. WVUP is accredited in good standing with the Higher Learning Commission (HLC) and holds a number of departmental and discipline-specific accreditations.

The university is governed by a local Board of Governors appointed by the Governor of West Virginia in consultation with the university's President who reports to the Board of Governors and also to the Chancellor of the West Virginia Community and Technical College System and the Chancellor of the Higher Education Policy Council, currently a combined role. The college offers a wide range of credentials and degrees supported by a faculty and staff of approximately 400. As president, I supervise five vice presidents and all internal functions as well as the independently-governed, but university-staffed WVUP Foundation. We operate at three primary locations, our largest campus in Parkersburg, WV and a satellite campus in Ripley, WV with a downtown center in Parkersburg, and 10 community-based instructional centers.

Major accomplishments under my leadership include, but are not limited to:

- After seven years of year-to-year enrollment decline before my tenure began, we posted an increase of 16 percent new students fall 2020 and an overall enrollment increase of 10 percent for summer 2020; among West Virginia's 20 publicly supported colleges and universities, WVUP posted the largest overall headcount enrollment gain of 10 percent for the 2019-2020 academic year; 18 percent unduplicated headcount enrollment increase from fall 2018 to fall 2019 after my complete restructure of the university's recruitment and admissions leadership and processes;
- Enrollment in early college (high school dual credit) programs doubled from 500 to 1,000 students in a one-year period and shows promise for more growth;
- Workforce development training hours doubled from 46,000 annual training hours to 96,000 annual training hours delivered to an additional 2,000 non-credit students;
- WVUP courted and received the largest foundation donation in the 60-year history of the university, \$1.8 million from the Arnold Foundation to implement an intensive retention program;
- The university doubled the amount of competitive grant funding received in a one-year period with promise of significant continued increases, 57 new grants in two years;
- Significant enhancements to the physical plant of both campuses have been successfully completed, from essential needs such as new roofs, a new courtyard and parking lots on our Parkersburg campus, and addressing ADA-compliance issues, to a complete redecoration of both campuses to create more of a student-friendly vibe with new furnishings, new student lounge, and hundreds of candid photos of our students

- transferred to canvases lining the walls; redesign and transformation of the library into a modern learning commons;
- Reinvigoration and nurturing of long-ignored community and college/high school relationships resulting in immediate enrollment increases and much better reputation;
- Nurturing of relationships between WVUP and local nonprofit arts organizations to promote staging theatrical productions, hanging art installations, and hosting concerts on campus for the first time in many years;
- Reframing social justice efforts into an overarching equity program called Opening Pathways to Equity Now, the OPEN Project, after significant consultation with all stakeholders;
- Creation of an experiential learning program piloted with students in the strategic
 communications major, under the mentorship of their faculty and the professional
 marketing staff, who have taken over the marketing function of the university with such
 success that consensus is our marketing has never been better and our students were
 asked to create a statewide marketing campus for the West Virginia Community and
 Technical College System; pilot program set to expand into business, education and other
 majors through formation of a student recruitment team to supplement, if not to drive, the
 work of professional recruiters;
- Enhanced focus on shared governance through doubling the membership of the President's Cabinet to better represent all stakeholders; revision of the process to change or add policies and procedures to ensure broader stakeholder feedback;
- Development of a comprehensive short-term and long-term strategic plan for student recruitment based on the life cycle of the student, which served as the foundation for a new university-wide strategic plan completed fall 2020;
- Implementation of feasibility study which has put WVUP's dormant Riverhawk Farm back into service for farm-to-table with local restaurants and to grow potatoes for a locally-based national potato chip company; funded by \$300,000 in pledges and grants to date:
- Creation of the WVU Parkersburg Proud Initiative, a presidential fundraising initiative announced two years ago in collaboration with the WVUP Foundation, the first goal-setting, deliberate fundraising campaign in the university's 60-year history; goal set to raise \$3 million in three years; in less than two years we doubled the goal, presently developing a more ambitious campaign;
- Veterans Resource Center ranked eighth in the nation in 2020; bachelor's degree in early childhood education ranked first in the nation in 2020; five national education marketing awards won in 2020, more than any college in West Virginia; 21 active Learn and Earn workforce development student internship/externship experiential learning partnerships with area business and industry, more than any college in the nation.

Innovative Behavioral Services, Inc., (IBS) Ridgeland, MS, January 2007-Present; Vice President for Academic and Sponsored Programs and Founder/Chief Executive Officer, National Institutes for Historically-Underserved Students (volunteer)

IBS is a statewide nonprofit providing mental health counseling and educational enhancement. It provides services to historically-underserved students and families without regard to their ability to pay, and my work over 13 years has focused primarily on fundraising. I have also worked to

ensure the continuous academic integrity in design and implementation of educational programs, and more recently I founded the National Institutes.

As a partnership initially led by IBS, Adams State University, and Alcorn State University, and now led by WVU Parkersburg, I founded, convened, and facilitated the first think tank meeting of the National Institutes for Historically-Underserved Students which brought together by invitation on the Adams State University campus 32 higher education, K-12 education, philanthropic, civil rights, and healthcare leaders from across the nation with our students to sign a *Declaration on the Rights of Historically-Underserved Students*. Two additional think tanks have been held at WVUP, and the college and its foundation have assumed the fiscal and programmatic management of the Institutes which now has more than 75 national leaders as active participants, along with many student ambassadors. Our most recent event in Parkersburg included leaders from 22 states and the District of Columbia.

There are four inter-related institutes operating under one umbrella:

- The Institute for Social Justice in Higher Education
- The Institute for Curricular Reform in Higher Education
- The Institute for Research and Best Practices in Higher Education
- The Institute for Pre-K through Adult Education Partnerships in Higher Education

The Institute for Social Justice in Higher Education will focus on civil rights issues advocating for historically-underserved and disenfranchised student populations.

The Institute for Curricular Reform in Higher Education will develop curricular materials based on research and best practices that can be shared with colleges and universities at no cost or cost-recovery because texts by publishers have become prohibitively expensive for our most vulnerable students. This Institute will also focus on development of culturally-relevant pedagogies.

The Institute for Research and Best Practices in Higher Education will utilize research-based models to test the theories which emerge from the other Institutes and to validate the efficacy of our work. It will be the dissemination arm to share cross-institute resources with the broader education community.

The Institute for Pre-K through Adult Education Partnerships in Higher Education will build primary/secondary/higher education partnerships and a continuum of best practices. The Institute will focus on familial education and develop resources with that focus.

Chris Gilmer and Associates Consulting, Parkersburg, WV and Vicksburg, MS, 2000-Present, President

I coordinate a group of affiliated, independent college and university faculty members from various disciplines to serve the training and grant writing needs of clients nationwide. Part of our work funds the pro bono services of a nonprofit organization, Innovative Behavioral Services, Inc., a regional nonprofit social services agency providing counseling services and educational support to historically-underserved populations without regard for their ability to pay. I serve as a volunteer officer of the nonprofit.

Clients have included RMC Research Corporation, Mississippi Band of Choctaw Indians, University of Alaska Southeast, Florida State University, Alcorn State University, U.S. Virgin Islands Department of Education, Puerto Rico Department of Education, Mississippi University for Women, Johnson Controls International, Educational Testing Service (ETS), and the U.S. Departments of Education, Justice, and Health and Human Services.

Our work focuses on curriculum development and redesign, specialized writing and editing services, and faculty development training. Additionally, we have secured in excess of \$75 million in competitive federal and non-federal grant funds for clients nationwide. We specialize in researching grant opportunities, matching them with clients, writing and submitting applications, and grants management/evaluation. I have worked as a Faculty Programs Consultant for Cengage Learning, one of the nation's largest educational publishers, providing peer-to-peer keynote addresses and training workshops on developmental education to faculty members and administrators at national and regional conferences and campus-based faculty training events. Cengage maintained a cadre of only 10 Faculty Programs Consultants chosen from a large national pool of faculty candidates.

For 20 years, I have worked with such global educational leaders as the U.S. Department of Education, Educational Testing Service (ETS), and RMC Research as a consultant providing training and technical assistance nationwide through the Comprehensive Centers and Regional Educational Labs on such topics as developmental education, online and adult education, cultural diversity, differentiated instruction, team building, infusing culturally relevant pedagogy, student success, and grant writing. One current consulting project is to develop and sustain a professional learning community of educators in the high-poverty Mississippi Delta, now in its fifth year, and to provide them with training and technical assistance on improving low-performing schools.

Alcorn State University, Vicksburg, MS, August 2013-June 2018 (except for July 2016 through February 2017); Executive Director/Chief Operating Officer, Alcorn State University, Vicksburg Center; Director of Online Education for the ASU System; Professor of English; Executive Director, Southwest Mississippi Center for Culture and Learning; Consultant for Online Education and Vicksburg Expansion

ASU is the oldest public land grant HBCU in America and has been promoting student success and closing the achievement gap for historically-underserved students since 1871. ASU serves almost 4,000 students at three primary locations including its historical residential campus in Lorman and extension centers in Natchez and Vicksburg. I served as Executive Director in charge of the Vicksburg Center overseeing budgets, facilities, personnel, course offerings, continuing education, and community relations. I also served as Director of Online Education for ASU across all locations promoting and developing new online course offerings and degree programs, online education protocols and procedures, academic computing infrastructure related to online education, and faculty development.

University service included membership on the Provost's Advisory Council as a direct report to the Provost, Council of Deans, and Graduate Council. I chaired the Academic Technology Users Group which monitored academic technology use and online education and made recommendations to the Provost and President regarding these university functions. I was hired as a consultant to develop online education and to support expansion into Vicksburg and development of the Vicksburg Center. I transitioned from consultant into administrative roles

June 2015, at which time I transitioned from an administrative role to an adjunct faculty role at Walden University.

In Vicksburg, I served on the steering committee which led to the city's selection as a Ford Next Generation Learning City, the first in Mississippi and 25th nationwide. In conjunction with the Vicksburg Warren School District, we won the Governor's Award for Exemplary Educational Partnerships for our STEM program with the Thurgood Marshall Foundation, one of only two such programs nationwide.

Adams State University, Alamosa, Colorado, July 2016-February 2017, Vice President for Academic Affairs and Chief Academic Officer; Professor of English, tenured

Adams State University is the oldest federally-designated Hispanic-Serving Institution (HSI) in Colorado and a highly diverse university. It educates students through face-to-face, online and hybrid bachelor's through doctoral programs including a unique program for incarcerated students and a Council for Accreditation of Counseling and Related Educational Programs-accredited (CACREP) master's program in counseling.

Reporting directly to the President, I was one of three vice presidents comprising the senior management team and having signature and other decision-making authority in the president's absence. Under her leadership, we administered a \$60 million annual budget, and I had direct responsibility for the budget of the academic sector. I sat on the Executive Council, President's Cabinet, and Athletic Council while convening and presiding over the Academic Council (council of departmental chairs) and Graduate Council, directly supervising the Associate Vice President for Academic Affairs and Assistant Vice President for Academic Affairs. Additionally, since Adams does not have an academic structure including deans, I directly supervised 13 departmental chairs, the first-year experience program, directors of the library and academic technology, the major in interdisciplinary studies, research and sponsored programs, and distance and continuing education programs.

While fully-accredited, Adams was on probation from the HLC when I arrived, primarily for violations in its distance education programs, and I oversaw complex reaccreditation efforts resulting in removal of the university from probation and restoration to normal accreditation status. At the state level, I sat on the Chief Academic Officers Council with representatives from all other public universities and community colleges in Colorado. I networked extensively with the Adams State Board of Trustees on matters related to academic affairs and with the Office of Title V Programs to oversee academic components of the suite of grants received based on the university's HSI designation.

Major accomplishments included, but were not limited to:

- Overhaul of developmental programs to include two corequisite education pilots in math and one pilot in English embedded into the local high schools;
- Founding of FUTURO Education, Families United To Unleash Rural Opportunities, an umbrella for the university's community-based programs serving the 14 independent school districts in the San Luis Valley with emphasis on dual enrollment for high school students;

- Supported overhaul of general education based on a unique model using equity and inclusion as the foundation;
- Evaluation and rebuilding of the Office of Extended Studies (distance education) which oversees distance education and was the focus of concern resulting in HLC probation;
- Oversaw faculty retention, promotion, and tenure;
- Successful site visit from CACREP resulting in full accreditation for doctoral program in counseling; also accredited at the master's level;
- Receipt of National Science Foundation ADVANCE grant to promote minority women in STEM fields; served as Principal Investigator;
- Development of training sequence implemented for Academic Council and Extended Studies management and staff on best practices in online education and evaluation of online course quality;
- National search for Assistant Vice President for Academic Affairs/Graduate Programs, Research, and Sponsored Programs; oversaw searches for other senior positions;
- Taught Ethnic and Minority Literature in the Department of English during my first semester on campus because the university lost its only other scholar in this area and the course was going to be canceled;
- Formed and nurtured strong relationships with the university's students, management team, trustees, faculty, staff, alumni, and community supporters;
- Actively supported the university's programs for its most vulnerable students including Community for Inclusive Excellence, Leadership, and Opportunity (CIELO), Upward Bound, College Assistance Migrant Program (CAMP), Cultural Awareness and Student Achievement Center (CASA), Boettcher Teacher Preparation, and others;
- Formed strategic partnerships with other minority-serving institutions, research universities, community colleges, federal technical assistance providers, nonprofits, and private companies nationwide;
- Developed and deployed an equity-based academic strategic planning model to replace the dated 2009 academic master plan;
- Oversaw university's reaccreditation efforts to comprehensively and strategically prepare for HLC's successful November 2017 site visit;

Walden University, Minneapolis, MN, August 2009-June 2016, Core Professor and Chair/Academic Coordinator, Department of Undergraduate Writing, College of Undergraduate Studies (CUGS); Contributing Faculty, CUGS; Chair, Writing Task Force; Faculty Development Director for CUGS

A member of the Laureate Educational Network of 70-plus universities with more than one million students worldwide, Walden enrolled at the time of my service 60,000 students from almost 150 countries. It is among the largest, most highly accredited fully online universities in the world. I served five years as departmental chair/academic coordinator and then as a contributing faculty member in the College of Undergraduate Studies, providing its general education curriculum. I oversaw the remotely distributed undergraduate writing faculty and taught courses in all areas of writing, women's literature, modern popular culture, and interdisciplinary studies. I also served as Chair of the Walden University Writing Task Force, an elected member of the College's Curriculum Committee that approves all major course changes and all new courses, a member of the first-year experience committee, and as a senior colleague

for new faculty members. I recommended curriculum revisions and new course development in the area of writing, chaired the task force that developed the writing skills assessment test, and was a member of the Faculty Advisory Panel for the Center for Faculty Excellence (CFE).

A recipient of the 2014 Faculty Excellence Award, one of only ten such awards given each year and selected from a global faculty of 3,000, I served on Walden's university-wide accreditation steering committee chairing the subcommittee on mission. I also chaired the subcommittee on student issues for the general education academic program review that supported a 10-year reaffirmation of accreditation from the HLC. I directed faculty development for CUGS, served on the committee developing Walden's new undergraduate honors program, and served on the CFE task force to measure the social change impact of Walden's graduates. Elected as a faculty representative to my college's senior management team, diversity in faculty recruitment and hiring grew through my efforts as departmental chair and in other leadership roles. Co-founded online support communities/affinity groups for Black and LGBTQ+ students, and allies.

Mississippi State University, Mississippi State, MS, August 2010-May 2013, Visiting Faculty Member and Curriculum Developer, Department of English

Mississippi State is a large land-grant university committed to broad access to higher education and high quality academic programs. I was hired for a three-year fixed term appointment ending May 2013 to develop and pilot teach a fully online Certificate in Professional Writing at the undergraduate and graduate levels including course development. As part of the certificate, I developed and piloted a course in grant writing that was among the most popular new electives.

Jackson State University, Jackson, MS, January 2007-May 2010, Associate Professor of English and Curriculum Enhancement Team Chair, Department of English; Senior Grant Writer, Office of Institutional Advancement, Division of Development

JSU is a comprehensive, urban Historically Black University (HBCU). I facilitated teams that secured grants from the Kellogg Foundation, Lumina Foundation, Hearin Foundation and others with responsibility for working with deans and department chairs to develop and administer all non-federal grant submissions for the university. Additionally, I oversaw compliance and reporting issues for funded grants. I developed and taught beginning through advanced undergraduate courses, advised students, and served on a variety of committees including the Provost's Quality Enhancement Plan (QEP) team and the Community College Articulation Agreement Committee. As part of the QEP team, I chaired a cross-disciplinary task force of junior faculty and graduate students in revising the university's freshman composition curriculum with rigorous placement testing and measurement standards. Service learning, learning communities, culturally relevant texts, and instructional technologies were added.

Pacific Institute for Research and Evaluation (PIRE), Calverton, MD (worked remotely), January 2004-December 2006, Deputy Director for Special Programs, Southeast Center for the Application of Prevention Technologies (CAPT)

Responsibilities included providing training and technical assistance to clients in 12 states and jurisdictions on various health and educational topics, strategic planning and resources allocation, primary responsibility for all supplemental projects such as U.S. Department of

Education grantees, data collection and reporting. Additionally, I served as a member of the four-member CAPT management team, and I oversaw all diversity and communications functions.

Tougaloo College, Jackson, MS, August 1999-December 2006, Associate Professor of English, tenured; Chair, Department of English and Modern Languages; and Founding Director, Center for Faculty Development

Tougaloo College is a private liberal arts Historically Black College (HBCU) with high academic standards that celebrates its important historical role in the Civil Rights Movement. While at Tougaloo, I chaired the Department of English and Modern Languages, developed and taught courses from developmental writing and composition through honors senior courses in British, American, and world literature. I directed the tutoring programs of the Writing Center and Writing across the Curriculum initiatives, co-directed undergraduate research programs, and served on the college's successful reaccreditation team. While at Tougaloo, I mentored more HBCU Mellon Fellows than any other faculty member at any HBCU nationwide and helped to redesign the first-year experience. I also taught in a bridge program for high school students through the college's TRIO program and prepared students for the Tougaloo College/Brown University student exchange program.

Selected by and reporting to the provost to serve as the Center for Faculty Development's founding director, I led efforts in developing, implementing, and revising the college's faculty performance assessment system; assisting faculty members in developing portfolios for tenure and promotion; recruiting diverse faculty members; developing individualized corrective plans for faculty members not meeting approved standards; conducting needs assessment regarding faculty training needs and providing training; assisting faculty members in the preparation and submission of grants; securing funds for and fostering faculty/student undergraduate research; mentoring junior faculty and developing a formal senior/junior faculty mentorship program; gathering faculty performance data and generating reports drawn from the data for accreditation and other purposes; serving as a liaison between the faculty and senior administrators; creating opportunities to maintain high faculty morale; and performing a wide array of related tasks.

While at Tougaloo, I served as a consultant for Belhaven University, a private liberal arts college, as it developed its highly successful adult education program, developing and piloting most of the modules in composition and communication and teaching as an adjunct in the working adult program for five years.

Developing Resources for Education in America, Inc. (DREAM), Jackson, MS, 1992-2001, Acting President, Associate Executive Director, Executive Editor, and Senior Vice President for Research and Sponsored Programs; Founding Director/Principal Investigator of the Southeast Center for the Application of Prevention Technologies and Founding Chair/CEO of the National CAPT Network

DREAM was a publisher of early childhood through adult educational materials and a provider of training and technical assistance. Originally hired to provide leadership to the publishing division serving 26 states and Puerto Rico, I was quickly and additionally promoted to lead the transition of this small, locally-based non-profit agency into a regionally and nationally respected educational publishing house and training provider. I served as managing editor of a series of pre-K-2 children's books on cultural diversity (and author of one volume) with gross sales in

excess of \$1 million. This series, promoting life skills, critical thinking, and cultural diversity, was distributed through a grant to every kindergarten and first-grade classroom in Mississippi and translated and culturally adapted for extensive use in Puerto Rico's kindergarten program.

I oversaw DREAM's publications and media relations and its first grant writing campaign, securing \$20 million for the company, more than doubling the staff, and increasing the annual budget three-fold to over \$10 million. Duties included overseeing all aspects of national conferences for audiences as large as 500. As a member of the executive committee, I networked extensively with the Board of Directors, oversaw budgetary and personnel matters including hiring and termination issues, diversity in employment issues, and grant administration, data collection and analysis, project evaluation, and grant reporting. While at DREAM, I presented keynote addresses or workshops at more than a dozen national and international conferences and served two terms as Chair of the Mississippi Executive Prevention Council. I served as Acting President while the founding President took a one-year sabbatical.

For two years, I served as the Founding Director/Principal Investigator of the Southeast Center for the Application of Prevention Technologies (Southeast CAPT), a 12-state and jurisdiction technical assistance center competitively funded to DREAM by the U.S. Department of Health and Human Services under a grant that I wrote. The CAPT provided training and technical assistance as part of the National CAPT Network serving all 50 states and U.S. jurisdictions. I was elected by my peer directors and approved by the funding agent to serve as the inaugural Chair/CEO of the National CAPT Network, overseeing approximately \$25 million in federal funds with five regional offices and 200 employees nationwide.

Prior to 1992

I served as Director of Public Affairs at Mississippi University for Women and as managing editor for two award-winning weekly newspapers. During this period of time, I also served as an adjunct instructor at Mississippi College, a private liberal arts college, and at East Central Community College.

SELECTED AFFILIATIONS (Present and Past) AND PUBLICATIONS

National Commissioner on College Readiness, American Association of Community Colleges

Innovative Behavioral Services, Inc. (volunteer vice president)

Board of Directors, Mid-Ohio Valley Regional Council

Board of Directors, Artsbridge

Board of Directors, Mid-Ohio Valley Chamber of Commerce

Rotary International, Rotary Club of Parkersburg Board of Directors, current President-Elect; prior member, Rotary Club of Vicksburg

Mid-Ohio Valley Chamber of Commerce's 2019 Business Leader of the Year

Founding Co-Convener, Research Alliance on Improving Post-Secondary Success at HBCUs, Regional Educational Lab Southeast at Florida State University

Founding Co-Convener, Research Alliance on Improving Schools in Mississippi, Regional Educational Lab Southeast at Florida State University

Board of Directors, Founding Vice Chair, Discovery Zone Children's Museum of Parkersburg

Board of Directors, Mountain of Faith Homeless Ministries

Campaign Cabinet, United Way of West Central Mississippi, committee co-chair

Advisory Board, University Press of Mississippi

Vicksburg/Warren County Chamber of Commerce

Steering Committee, Ford Next Generation Learning Vicksburg

Advisory Board, Southwest Mississippi Center for Culture and Learning

Vicksburg Association of Marketing Professionals

Presented more than 100 workshops and keynotes for colleges, private sector, and conferences nationwide spanning two decades; presentations include keynote addresses for statewide conferences of the South Carolina Association for Developmental Education and the Florida Association for Developmental Education and at national conferences on developmental education, adult education, cultural diversity, infusing culturally diverse pedagogy into the curriculum, team building, grant writing, integrated reading and writing, first-year experience, and college success for first-generation and other historically-underserved students

Three invited presentations at the White House Conference on HBCUs

"Making Colleges Student Ready: It's About Time," conference panel presentation for The Society for College and University Planning, October 2021 conference at the University of Illinois-Chicago, lead presenter

Writer and editor of published curricula and training materials, creative nonfiction, children's literature, scholarly peer-reviewed articles, grants, magazine and newspaper articles, and training module on grant writing published by Educational Testing Service (ETS)

Creative nonfiction anthologized three times in peer-reviewed collections by University Press of Mississippi alongside Nobel- and Pulitzer Prize-winning authors and international leaders such as Oprah Winfrey

"You Are Worthy of Your Dreams," editorial column published in *Diverse: Issues in Higher Education*, spring 2020

"A Letter to George Floyd," editorial column published in *Diverse: Issues in Higher Education*, summer 2020

Peer-reviewed academic publications: Studies in American Drama, 1945-Present; Journal of Developmental Education; Mississippi Encyclopedia, and Encyclopedia of Online Education

Children's Big Book nine-volume series managing editor (writer of one volume) distributed nationwide with sales in excess of \$1 million, translated and culturally adapted for use in Puerto Rico's kindergarten program

Published interviews with renowned actors and writers Ruby Dee, Margaret Avery, James Baldwin, and Susan Sontag

Scholarship in Process:

"Imagining the Future: Historically Black Colleges and Universities—A Matter of Survival," book chapter for a peer-reviewed book forthcoming from Information Age Publishing, co-author

"The Efficacy of Assessment Measures Used for Admission and Certification and Differential Impact on People of Color," peer-reviewed article forthcoming from the National Education Association, co-author

Statement of Leadership Philosophy

Chris Gilmer, Ph.D.

A leader knows when to talk and when to listen, and generally spends more time listening. A leader knows what she knows and is confident enough to admit what she does not know. She surrounds herself with people who complement her strengths. A leader takes responsibility for his own actions and for any failure that occurs on his watch, while he is eager to share credit for every success with the members of his team. A leader makes decisions by achieving broad consensus whenever possible, knows when a decision must be made, and is not afraid to make the hard ones alone when they must. They weigh the needs of the many and the needs of the few, making choices fairly even when they cannot always be popular. A leader is respected for transparency and integrity even by the person who occasionally does not agree with one of his decisions. She would always wish to be well liked, but realizes it is more important to be trusted.

Within the higher education sector—while students, faculty, staff, administrators, alumni, donors, and community members are all vitally important—a leader has one primary consideration as the basis for every decision: what is best for the students we serve? Serving students is not just a job. It is an honor. It is why we are here, and a higher education leader is a passionate and tireless advocate for students.

A leader balances consistency with innovation and leverages all available resources, internal and external, to achieve or to exceed the desired outcomes. She realizes that the university must be for and of the community it serves, and she is never too busy to spread the message to one person in line at the post office or one thousand people listening to a keynote address. They feel successful only when the community beyond the university's walls feels ownership and pride and when the community within its walls feels heard, validated, and inspired. A leader does not create a culture of individual personality which could falter when she leaves, but endeavors to create a culture of community with shared vision and common goals which will endure long after she is gone.

My leadership philosophy is simple: I ask no one to work harder than I work or to do anything I would not do myself. I create a deliberately non-hierarchical structure in which all people feel empowered and respected, in which any person feels free to respectfully disagree with me and is willing to accept my respectful disagreement. Such acceptance is the very beginning of building consensus. I evaluate each person on his, her, or their merits based on my own experiences with that person, and I begin new professional relationships with high expectations. I do not say anything about someone that I would not say directly to that person. I expect to be treated by those I lead and by those who lead me no better and no worse than this. For many years, I considered myself a servant leader, trying always to embody the best meaning that the word "servant" connotes, a spirit of service. Since the word also connotes a meaning of hierarchy and a structure in which one person is more than another, however, I have coined the term "partner leadership," a structure in which each of us can serve equally and with dignity, but in which no one is perceived as less-than. I am a partner leader. I can force people to do almost nothing, but inspire them to do almost anything that is worthy. If ever this is no longer the case, the organization needs a new leader.

Vision Statement for Inclusive Excellence in Higher Education

Chris Gilmer, Ph.D.

With notable exceptions, colleges and universities have always been among the most progressive institutions in American culture, usually ahead and often far ahead of the states and communities in which they are set. We are called to lead and should never be satisfied to follow. Inclusive excellence is one of the critical leadership opportunities of this moment in history for American higher education. We are the laboratories wherein students of every sex, race, age, socioeconomic status, religion, gender, sexual orientation, and every other defining characteristic known to humankind come together. If higher education is called on to educate the mind for professional achievement and community service, are we not also called on to educate the spirit to effect positive social change in a world culture that becomes more global every day? We are the laboratories wherein top academic performers sit in classrooms alongside underprepared students struggling to read the textbooks, and we owe just as much to one as to the other. We are the laboratories in which fifth-generation college students matriculate with firstgeneration students who have no existing culture of higher education in their families. Transgendered people learn alongside grandmothers, and all hold equally the promise for future generations of their families and the world family. If higher education does not model the behaviors that need to be mainstreamed into society, what institutions will fill that role? The question is not whether we can afford to do it; the question is whether we can afford not to do it.

Tolerance is not enough. Acceptance is not enough. They are necessary, but insufficient. What we must do, what we must be, is more difficult than that—and more promising. We must learn to celebrate that which makes us different as fully and as easily as we celebrate that which makes us the same. What makes us the same, our shared humanity, will take us only so far. The differences in innate abilities, ways of thinking, learned skills, methods of communication, natural orientations, core beliefs, and other individual traits will take us the rest of the way. Watch a group of toddlers playing together in a sandbox

for a glimpse of what we might become. They do not define by race. They do not define by gender. They do not define by social class. Prejudice is taught and learned, fed by one generation to the next. The good news: if it is taught and learned, it can be untaught and unlearned if we are willing to do the hard work and to do it honestly. No longer a wide-eyed child, it is predictable for adults to sometimes fear that which is different, even to promote our own survival at the expense of others. But do we not wish to do more than survive? Are we not called to become something more than predictable? Ultimately, should there not be one united humankind made up of diverse voices?

Infants are not afraid of much, so perhaps we must become as they are—optimistic, open, unjudging, innocent—to live into our full potential. In short, we must be reborn. The gestation has begun. We are growing every day. The birth will not be an easy one. Higher education must be the midwife of this global human rebirth, and if we do our job well, imagine the world in which all of our grandchildren may live together in peace.

Statement of Educational Philosophy

Chris Gilmer, Ph.D.

The best teachers I know are occasionally, but rarely, "sages on stages." More often, they are coaches who unlock, affirm, and expand the wisdom students already possess and facilitators who create safe spaces in which students can learn not only from them, but from each other and the world around them. Good teachers sometimes provide answers, but are much more interested in asking important questions. They are comfortable in the absence of answers when none exist, secure in their command of their subjects, but equally secure in their own fallibility. They never pass up a teachable moment, and they are more interested in helping students learn how to learn than in precisely what they learn. Good teachers take their responsibility very seriously and themselves seriously enough, but never too seriously. Over time, they become masters of whatever approach works best for them, and they see themselves as much or more as facilitators and partners as they see themselves as leaders. The best teachers provide examples, starting with the most important example of their own lives, and they become role models who inspire students to grow into their best selves while not being afraid of or embarrassed by their own humanity and a few false starts along the way.

Based on my humble beginning in the cotton fields of rural Mississippi, I have adopted the personal creed, "To whom much is given, of him or her is much required." With the help and sacrifice of more people than I can name, I am living proof that a person can rise above the stereotypes and low expectations society sets for him, and I work daily toward the goal of opening educational doors for this generation and the ones to follow. As a first-generation college student, I have devoted my career to date to enfranchising the disenfranchised, to educating those that some deem uneducable, and to serving as a voice for those who need an advocate and are, at least temporarily, unprepared to speak for themselves. Having spent my academic career with underserved students, I have been privileged to serve thousands of first-generation college students, under-prepared learners, honors students, traditional and adult learners,

students who came to college from around the corner and from the other side of the world. A good teacher embraces all kinds of learners. There is no need for any college without the students it serves, and I have celebrated equally with the dyslexic basketball player to whom I taught vocabulary words while shooting free throws and the Rhodes Scholar finalist whom I helped gain admission to law school.

My life is a case study in the transformative power of education, not just for individuals, but for families and entire communities. Education is the great equalizer. It must not be simply a privilege of those to whom access comes easily. It must not be tailored only to serve the needs of those prepared to excel. It must be a right of every person willing to work hard for it. It is less the job of the student to meet higher education fully prepared than it is the job of higher education to meet each student wherever she, he, or they might be along the continuum and to serve as a bridge to opportunities for a lifetime of professional contributions and service. Only when this vision is realized will the promise of equality and social justice for all made so long ago by this nation be kept.

A teacher is a lifelong learner who leads students with one part inspiration, one part personal example, and one part benevolent authority. The student is not always right, but neither is the teacher. The student is, however, always the student and, as such, our only reason for choosing this vocation. In 2021, a classroom can be in a traditional building with tables and chairs, a field of clover in motion under a March breeze, a strip mall, a beach with wireless Internet connection, a home nursery while an infant sleeps, or a workplace cafeteria. It can be in Mexico City or Prague; Parkersburg, West Virginia or Atlanta, Georgia. Students do not care what we know until they know that we care. Students can be forced almost nowhere, which is as it should be, but they can be inspired almost anywhere. Teaching is, therefore, a sacred trust, an awesome responsibility, an honor, and perhaps for the very best teachers, even a calling. Over the years, many students have asked me if I will remember them should we meet again at some far distant time. My answer: Maybe not if I only taught you something, but absolutely if you taught me something. What a radical notion—teachers not afraid to learn with and from those they teach.

Office: 601-952-0894 E-mail: djceo@ibshealthy.com

EDUCATION:

Ph.D.: Health Administration

Jackson State University-MBA: May 1992

University of Southern Mississippi- Bachelor of Science (JJ Counseling)

OVERVIEW

With a Ph.D. in healthcare administration, 25 years of upwardly mobile experience as a mental health practitioner and manager, and a master's degree in business administration, Dr. Dorothy J. McGill is a rare combination of someone who is equally competent as a project manager or a case worker, a therapist or an accountant. She understands both the clinical or human side of mental health and the fiscal realities. She is a counselor and a business woman, a clinician and a CEO. Dr. McGill's significant experience includes, but is not limited to, health education and management, fiscal and programmatic management and review of grants, curriculum planning and development, counseling and training, personnel management, alcohol and substance abuse prevention and treatment, computer applications, budget preparation and monitoring, grant writing and governmental agency program management, nonprofit management and fundraising.

PROFESSIONAL EXPERIENCE

MANAGEMENT/ADMINISTRATIVE:

Adjunct Professor (Department of Allied Health-Health Care Administration) Jackson State University, Jackson, MS

Direct a \$2.5 million dollar (Partnership for a Healthy Mississippi) statewide tobacco project with primary emphasis on review of proposals for funding, public health training, fiscal management and accountability

Directed a \$2.8 million dollar (MS Department of Mental Health) statewide alcohol and drug abuse prevention program with primary emphasis on review of grants for funding, certification of programs, data collection and analysis

Directed a \$1.5 million dollar statewide federally funded program (MS Department of Rehabilitation Services-) geared toward improving service delivery for individuals with physical/mental health difficulties requiring supported employment with primary responsibilities to develop request for proposals, review proposals and programmatic and fiscal accountability for funded proposals

MANAGEMENT/ADMINISTRATIVE:

Case 8:25-cv-01154-BAH Document 46-23 Filed 06/24/25 Page 316 of 364 Managed and directed a statewide project (MS Department of Rehabilitation Services), a federally funded job placement program geared toward those individuals having cognitive health deficits and have sustained head or spinal cord injuries.

Managed a community based project (Operation Shoestring), a federally funded youth services program with particular emphasis on serving individuals who were economically disadvantaged.

Managed and supervised a statewide project (MS Department of Human Services), a federally funded employment and training program whose service delivery population included those individuals in receipt of State Health care and Food assistance.

Supervised counseling program as Youth Court Counselor-(Madison County,1975-1980)-provided counseling for juveniles and parents, completed social histories, intake assessments, court testimonies and home visits and assessed for placement for training schools and/or outside home placements.

TRAINING/CONSULTANT ACTIVITIES:

1997-National Presenter for APSE (Association for Persons with Supported Employment), New Orleans, LA

1999-National Presenter for RADAR Conference, Irvine California

2001-2002-Consultant for Jackson State University's HYPER Department (NCATE and SACS Review)

2002- present Conflict Resolution/Peer Mediation Module-Developer of Curriculum for Department of Education (Mississippi)

2002-presenter Conflict Resolution, Noxubee School District

2002-Consultant for Sister to Sister Project, Mississippi Department of Health

2003-presenter Conflict Resolution, Jackson Public School District, Yazoo City School District and Holmes County School District

2003-presenter Peer Medication-Mississippi Valley State University (Staff for Housing)

2003-2004- National Youths Sports Program, Trainer/Consultant for Prairie View A&M University, Prairie View Texas

2003-present-LIFESAVERS Program, Innovative Behavioral Services, Inc.-Holistic Approaches to Cardiovascular Health

2005-2006-Prevention, Trainer/Consultant for Pacific Institute for Research and Evaluation

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TRAINING/CONSULTANT ACTIVITIES:

2005-present-JSU (Jackson Heart Study) Ethics Advisory Board, Community Partnership Coalition and Community Health Advisor Network Board

2006-2007-Consultant for Jackson State University, CSET, LS-MAMP, Opportunities in Biomedical Research

2006-2009-Consultant for Jackson State University, SEPA, Opportunities for High School Students in Health and Focusing on Health Disparities

August 8, 2012-Presenter for Children's Mental Health Conference (SMHART Institute-Jackson State University College of Public Service School of Social Work)-Developmentally Appropriate Behavior: Social and Emotional Development

2013-present-Community Engagement & Outreach Core Advisory Board (Jackson State University, University of Michigan & University of Mississippi)

February 28, 2014-Panel Presenter (35th) Annual Minority Health Conference Innovative Approaches to Youth Health: Engaging Youth in Creating Healthy Communities

Factors Affecting Dietary Practices in a Mississippi African American Community Health 2017, 14(2), 209; doi:10.3390/ijerph14020209y, Monique White, Clifton Addison, Brenda Jenkins, Frances Henderson, Dorothy McGill, Marinelle Payton, and Donna Antoine-LaVigne.

Perception of Policy and Environmental Action to Promote Healthy Behaviors in African American Communities 2017, 14(2), 209; doi:10.3390/ijerph179316, Clifton Addison, Brenda Jenkins, Monique White, Frances Henderson, Dorothy J. McGill, Donna Antoine-LaVigne and Marinelle Payton.

Trainer/Consultant for the City of Canton, MS (Mayor's Office)

Trainer/Consultant for the Claiborne County School System

Professional Consultant-Prevention Expert (Johnson, Bassin and Shaw)

EMPLOYMENT

Innovative Behavioral Services, Inc. (IBS), Ridgeland, Mississippi (November 2001 to present) Chief Executive Officer/Lead Clinical Mental Health Counselor: Responsible for day to day operations of a behavioral health clinic with specific concentration in Alcohol and Substance Abuse, tobacco prevention, behavioral problems for children and other mental health services, provide specialized counseling to adults and adolescents, provide individual, group and family counseling;

EMPLOYMENT

provide technical assistance to prevention programs in programmatic and fiscal operations, serve as liaison for justice and city courts (substance abuse and sexual abuse) in both rural and urban settings including Madison and Hinds County, training and presentations for school districts.

DREAM, Inc., Jackson, Mississippi (April 1999 to October 2001) Director of Tobacco and Mental Health Grant Programs: Train Community Youth Partnerships and Statewide Partners on Public Health issues relating to tobacco and preventive maintenance; collaborate and provide technical assistance for prevention programs on health care issues involving reduction and prevention of abuse/misuse of Alcohol, tobacco and other drugs; develop and implement a financial accounting system for tracking expenditures and disbursements of tobacco dollars for thirty-two programs; maintain inventory control of all equipment purchased with tobacco dollars; conduct financial audits of partnership programs; prepare annual budgets; prepare financial monthly reports for all programs; reconcile and balance bank statements; review financial documentation for accountability with program budget; consult with staff from Partnership for Healthy Mississippi on new innovations in health care relative to smoke-free policies and regulations.

Department of Mental Health (Division of Alcohol and Drug Abuse), Jackson, MS (August 1997 to March 1999) State Prevention Project Director: Certification of statewide mental health treatment and prevention programs, site visits, conduct and coordinate trainings; responsible for Synar compliance for tobacco, conference planning for health care professionals, conduct presentations, preparation of news releases, liaison with other state agencies and organizations; prepare reports; audit financial expenditures, assist with annual state plan, preparation of RFPs and recommend funding approval of prevention programs.

Department of Rehabilitation Services (Vocational Rehabilitation Division), Jackson, MS (October 1995 to July 1997) Project Director: "Project UNITE"-Directed and managed a statewide systems change project, interviewed and screened job applicants, hired personnel, provided orientation for new employees, monitored subgrants, budget preparations, fiscal accounting and inventory, supervision of field staff, auditing of financial records for subgrants, prepared annual plans for grant, conducted and coordinated training for supported employment program, conference planning, preparation of quarterly reports, preparation of RFPs and reviewed and recommended funding of subgrants for approval or denial based on federal preset standards.

Department of Rehabilitation Services (Vocational Rehabilitation Division) Jackson, MS (January 1993 to September 1995) Project Coordinator/Vocational Counselor: "Project OPTIONS"-Managed and directed a statewide job placement program for traumatically brain injured clients. Responsibilities included: interviewing and screening of job applicants, hiring of personnel, staff development training, new employee orientation, evaluating job performance, complying with ADA requirements, complying with EEO requirements, determining appropriate job placements and evaluation of vocational potential.

Department of Rehabilitation Services (DDS Division) Jackson, MS (April 1992 to December 1993) DRS-Claims Examiner: adjudicated claims for benefits such as those dealing with unemployed, retired, or disabled workers, veterans, dependents, or

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survivors: reviewed and evaluated data on documents and forms, claim applications, Birth or death certificates, physician's statements, employers' records, vocational evaluation reports, and other similar medical records. Interviewed or corresponded with claimants or agents to elicit information, corrected errors or omissions on claim forms, and investigated questionable data. Authorized payment of valid claims, or notified claimant of denied claim and appeal rights.

PROFESSIONAL LICENSURE/CIVIC ORGANIZATIONS:

Member of American Mental Health Association

Member of Employee Assistance Program Association

Licensed Clinical Mental Health Therapist (1999)

Member of National Association of Social Workers

Member of American Public Health Association

Member of NADDAC

Member of Ridgeland Chamber of Commerce

Certified Substance Abuse Professional

Certified Employee Assistance Professional (CEAP)

Certified Prevention Manager (Mississippi Association of Addiction Professionals)

Certified HIV/AIDS Trainer (American Red Cross)

Completion of Biomedical Responsible Conduct Research Curriculum (CITI-2014)

Completion of CITI Health Information Privacy and Security Curriculum (2014)

Completion of Social and Behavioral Research Curriculum (CITI-2014)

Mississippi Early Childhood Learning Guidelines Certification, (JSU, 2009)

Anger Management Certification for Adults (2006)

Mental Health Pre-Screening Evaluation for Children & Adults (2006)

Domestic Violence Certification

Mississippi Real Estate Commission-Broker's License

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Case 8:25-cv-01154-BAH Document 46-23 Filed 06/24/25 Page 320 of 364 PROFESSIONAL LICENSURE/CIVIC ORGANIZATIONS:

Licensed SASSI Evaluator and Interpreter

SPECIAL AWARDS/APPOINTMENTS

1975	Valedictorian-Durant Attendance Center
1978	Honors Graduate-University of Southern MS
1978	Juvenile Justice Advisory Committee via Governors Winter
	and Mabus
1985	Outstanding Young Women of America
1994	Project UNITE Advisory Committee via Dr. Nell
	Carney (Department of Rehabilitation Services)
2014-2015	Mississippi State Health Assessment

REFERENCES: Furnished upon request

Document 46-23

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FLORIDA STATE UNIVERSITY

Unique Entity ID CAGE / NCAGE Purpose of Registration

JF2BLNN4PJC3 3S772 All Awards

Registration Status Expiration Date
Active Registration Nov 16, 2023

Physical Address Mailing Address
874 Traditions WAY 874 Traditions WAY

Tallahassee, Florida 32306-0001 Tallahassee, Florida 32306-4166

United States United States

Business Information

Sponsored Research Administration

Doing Business as Division Name Division Number

Congressional District State / Country of Incorporation URL

Florida 02 Florida / United States HTTP://WWW.RESEARCH.FSU.EDU

Sponsored Research Administration

Registration Dates

Activation Date Submission Date Initial Registration Date

Nov 18, 2022 Nov 16, 2022 Nov 20, 2001

Entity Dates

Entity Start Date Fiscal Year End Close Date

Jan 1, 1851 Jun 30

Immediate Owner

CAGE Legal Business Name

(blank) (blank)

Highest Level Owner

CAGE Legal Business Name

(blank) (blank)

Executive Compensation

Registrants in the System for Award Management (SAM) respond to the Executive Compensation questions in accordance with Section 6202 of P.L. 110-252, amending the Federal Funding Accountability and Transparency Act (P.L. 109-282). This information is not displayed in SAM. It is sent to USAspending.gov for display in association with an eligible award. Maintaining an active registration in SAM demonstrates the registrant responded to the questions.

Proceedings Questions

Registrants in the System for Award Management (SAM.gov) respond to proceedings questions in accordance with FAR 52.209-7, FAR 52.209-9, or 2. C.F.R. 200 Appendix XII. Their responses are displayed in the responsibility/qualification section of SAM.gov. Maintaining an active registration in SAM.gov demonstrates the registrant responded to the proceedings questions.

Exclusion Summary

Active Exclusions Records?

No

SAM Search Authorization

I authorize my entity's non-sensitive information to be displayed in SAM public search results:

Yes

Entity Types

Business Types

Entity Structure Entity Type Organization Factors

Other Business or Organization (blank)

Profit Structure

Non-Profit Organization

ED 003493

Socio-Economis Evol \$25-CV-01154-BAH Document 46-23 Filed 06/24/25 Page 322 of 364

Check the registrant's Reps & Certs, if present, under FAR 52.212-3 or FAR 52.219-1 to determine if the entity is an SBA-certified HUBZone small business concern. Additional small business information may be found in the SBA's Dynamic Small Business Search if the entity completed the SBA supplemental pages during registration.

Other Entity Qualifiers

Educational Institution

State Controlled Institution of Higher Learning

Debt Subject To Offset No
CAGE Code 3S772

Points of Contact

Electronic Business

Sponsored Research Administration

Esther Wheeler 874 Traditions WAY

Tallahassee, Florida 32306

United States

874 Traditions WAY 3RD FL **EILEEN CAMPANALE**

Tallahassee, Florida 32306

United States

Government Business

Sponsored Research Administration

Esther Wheeler 874 Traditions WAY

Tallahassee, Florida 32306

United States

874 Traditions WAY 3RD FL EILEEN CAMPANALE, MRS

Tallahassee, Florida 32306

United States

Past Performance

874 Traditions WAY, 3RD Floor Russell Lentz

Tallahassee, Florida 32306

United States

Russell Lentz Sponsored Research Administration

> 874 Traditions WAY Tallahassee, Florida 32306

United States

Service Classifications

NAICS Codes

NAICS Codes Primary **NAICS Title**

Colleges, Universities, And Professional Schools Yes 611310

> 541330 **Engineering Services**

541713 Research And Development In Nanotechnology

541714 Research And Development In Biotechnology (Except

Nanobiotechnology)

Research And Development In The Physical, Engineering, And Life 541715

Sciences (Except Nanotechnology And Biotechnology)

541720 Research And Development In The Social Sciences And Humanities

Disaster Response



UNITED STATES DEPARTMENT OF EDUCATION Office of the Chief Financial Officer Contracts and Acquisitions Management

Determination and Findings to Revise Deliverables 91990022C0014 - REL Southeast P00004

Contract Number: 91990022C0014 - REL Southeast

Period of Performance: January 24, 2022, through January 2, 2027

Acquisition Plan Tracking Number: 800 Purchase Request Number: N/A

Purchase Amount: \$803,000.00

NAICS Code: 611710: Educational Support Services

UEI JF2BLNN4PJC3

Product and Service Code (PSC): R499: Support Professional: Other

Service Contract Coding Declaration: Other Function

AUTHORITY

Modification P00004 is executed in accordance with the following contract clauses: Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

BACKGROUND

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

DESCRIPTION OF MODIFICATION

The REL Southeast staff have conducted training across multiple states in the region designed to build the knowledge and abilities of content area teachers to integrate evidence-based literacy practices into their courses. Trainings have been offered in Florida, Georgia, and Mississippi. In response, the members of Mississippi Adolescent Literacy Partnership requested a companion tool in the form of a professional learning community (PLC). They believe a PLC could be an important resource for content area teachers involved in the Adolescent Content Area Literacy Project that has been implemented in Canton Public School District, Columbus Municipal School District, and Laurel School District in the state. And given prior interest in other states, the REL Southeast team believes this tool will be of broad interest in the region and nationally.

This tool will be unique in that it is designed to support tier 1 content area teachers in grades 4-12 in incorporating literacy into their instruction. While partners in the Southeast region feel as though they are making good progress teaching literacy in the primary grades, they have often noted the need to ensure upper grade students continue to grow in their skills. Therefore, teachers need to know how to integrate work in literacy without sacrificing time devoted to content area instruction. This tool will help them meet that challenge. In addition, because the sequence of instruction is unique, and the PLC will be designed to help tier 1 content area teachers integrate literacy practices into their courses, there may be an opportunity to expand the evidence base through a causal study of its use in the future.

The proposed budget for this project is \$812,691. The attached proposal has detailed budget tables for each year. Although the budget exceeds the amount of the supplemental funding, the REL Southeast can accommodate that difference within existing funding.

The addition of this project to the REL Southeast workplan will not negatively impact any other tasks or activities. There will be additional effort under Task 1 associated with submitting and tracking deliverables and under Task 3 as part of partnership maintenance. However, these burdens will be relatively small and can be accommodated under existing staffing and effort levels. The REL Southeast will not need to adjust the scope of any other projects because of initiating this one.

PURPOSE/ DESCRIPTION OF CHANGES

This modification will also include the following:

- The Institution of Education Sciences has authorized \$7.5 million of program funds to be made available to the 10 RELs to increase the total contract values on the 10 REL contracts for the 2022-2027 cycle. IES is statutorily obligated to allocate these additional program funds using the same funding formula that was used to determine the current total contract values for each REL region. As a result, REL Southeast will receive \$803,000 in additional contract value. In response to this contract value increase, REL Southeast's proposal documents dated July 17, 2023, that are hereby incorporated into the contract.
- The total contract funding value is increasing by \$803,000.00 and is going from \$27,000,000.00 to \$27,803,000.00.

- The total contract value is increased by \$803,000.00 and is going from \$11,551,202.98 to \$12,354,202.98.
- Revised deliverable schedule (to be included as part of the response for modification)
- In accordance with 3452.237-70 SERVICES OF CONSULTANTS, paragraph (b) (1), the daily rate set forth in this contract will be \$1100. This rate supersedes the previous daily rate of \$800.00.
- In accordance with FAC 2023-04 published June 2, 2023, this Modification also adds FAR 52.204-27 PROHIBITION ON A BYTEDANCE COVERED APPLICATION (JUNE 2023).

FUNDING

The total contract value is increasing by \$803,000.00 and is going from \$27,000,000.00 to \$27,803,000.00.

The total contract funding value is increasing by \$803,000.00 and is going from \$11,551,202.98 to \$12,354,202.98.

PR EDOIES-23-000283 was received on June 5, 2023, providing \$803,000 in total funds.

PERIOD OF PERFORMANCE

This modification does not affect the period of performance. The period of performance remains January 24, 2022, through January 2, 2027.

SYNOPSIS

There is no requirement for synopsizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the requirements of FAR 5.207 -Preparation and transmittal of synopses, with respect to the current proposed contract action.

SCOPE OF WORK

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

RECOMMENDATION

Based on the forgoing, it is hereby	determined that it is in the	e best interest of the	Government to
proceed with modification P00004.			

Recommend:	Approve:
------------	----------

Expired certificate	
X Jana Knapp	X
Ms. Jana Knapp	Mr. Joseph Gibbs
Contract Specialist	Contracting Officer
Signed by: JANA KNAPP	

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AMENDMENT OF SOLICITATION/I	MODIFICATION OF	CONTRACT	1. CONTRACT ID CO	DE	PAGE OF	PAGES
AMENDMENT OF SOLICITATION/	VIODIFICATION OF	CONTRACT			1	38
2. AMENDMENT/MODIFICATION NUMBER	3. EFFECTIVE DATE	4. REQUISITION/PURCHA	SE REQUISITION NUMBER	5. PROJECT NUI	MBER (If applic	able)
91990022C0014P00004	JUL 18, 2023					
6. ISSUED BY CODE US Dept of ED-550 12th Street SW - Room 7169 Washington DC 20065	CAMPCP	7. ADMINISTERED BY (See Block 6	lf other than Item 6)	CODE		
8. NAME AND ADDRESS OF CONTRACTOR (Number, stree FLORIDA STATE UNIVERSITY 874 TRADITIONS WAY TALLAHASSEE FL 32306			9B. DATED (SEE	T OF SOLICITATION TITEM 11) TION OF CONTRACT 91990022C	CT/ORDER NUI	MBER
			X 10B. DATED (SE	E (TEM 42)		
CODE 00027876 FA	ACILITY CODE		I IOB. DATED (SE	JAN 24, 2	2022	
	S ITEM ONLY APPLIES TO	AMENDMENTS OF	SOLICITATIONS	07 (1 V Z-+, Z	-022	
Offers must acknowledge receipt of this amendment prior to th (a) By completing items 8 and 15, and returning or (c) By separate letter or electronic communication which inc RECEIVED AT THE PLACE DESIGNATED FOR THE RECEI by virtue of this amendment you desire to change an offer alre communication makes reference to the solicitation and this am	copies of the amendment; (I cludes a reference to the solicita PT OF OFFERS PRIOR TO TH ady submitted, such change ma lendment, and is received prior	b) By acknowledging rec ation and amendment nu E HOUR AND DATE SP ay be made by letter or e	eipt of this amendment on mbers. FAILURE OF YOU ECIFIED MAY RESULT I lectronic communication,	n each copy of the or IR ACKNOWLEDG N REJECTION OF provided each lette	MENT TO BE YOUR OFFER or or electronic	
12. ACCOUNTING AND APPROPRIATION DATA (If required,)		NA1:6:4	Modification /		•
See Schedule				ion Obligated		
A. THIS ITEM APPLIES ONLY TO MODIFICATIONS CHECK ONE A. THIS CHANGE ORDER IS ISSUED PURS IN ITEM 10A. B. THE ABOVE NUMBERED CONTRACT/OF data, etc.) SET FORTH IN ITEM 14, PURS C. THIS SUPPLEMENTAL AGREEMENT IS E	UANT TO: (Specify authority) T RDER IS MODIFIED TO REFLE UANT TO THE AUTHORITY O	THE CHANGES SET FOI ECT THE ADMINISTRAT F FAR 43.103(b).	RTH IN ITEM 14 ARE MA	DE IN THE CONTI	RACT ORDER I	NUMBER
FAR 52.243-2 Alt I: Changes Cost D. OTHER (Specify type of modification and a						
E IMPORTANTI Contractor			4	. 4. 4	- ff:	
	required to sign this dod			s to the issuing	office.	
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organ Please see attached. Except as provided herein, all terms and conditions of the doct 15A. NAME AND TITLE OF SIGNER (Type or print)		10A, as heretofore chan		and in full force and		
Stacey Patterson, VP for F	Research	Joseph Gibbs, contract 202-245-6016 Joseph	specialist		·····y	
15B. CONTRACTOR/OFFEROR Rose Driber for Digitally signed by Rose Drib Standard Postage AVD for Stacey Patterson, VP for		16B. UNITED STATI		IOSEPH GIRRS	16C. DATE SIG	
for Research Date: 2023.07.25 16:14:00 -0	4'00' 7-25-2023		Digitally signed by Date: 2023.07.25 1	8:54:54 -04'00'	JUL 18, 2	J 2 3
(Signature of person authorized to sign)		(Signatu	re of Contracting Officer)			

Previous edition unusable

STANDARD FORM 30 (REV. 11/2016) Prescribed by GSA FAR (48 CFR) 53.243 The purpose of Modification P00004 for contract 91990022C0014 REL Southeast is the following:

- The Institution of Education Sciences has authorized \$7.5 million of program funds to be made available to the 10 RELs to increase the total contract values on the 10 REL contracts for the 2022-2027 cycle. IES is statutorily obligated to allocate these additional program funds using the same funding formula that was used to determine the current total contract values for each REL region. As a result, REL Southeast will receive \$803,000 in additional contract value. In response to this contract value increase, REL Southeast's proposal documents dated July 17, 2023, that are hereby incorporated into the contract.
- The total contract value is increasing by \$803,000.00 and is going from \$27,000,000.00 to \$27,803,000.00.
- The total contract funding value is increased by \$803,000.00 and is going from \$11,551,202.98 to \$12,354,202.98.
- Incorporate a revised deliverable schedule
- In accordance with 3452.237-70 SERVICES OF CONSULTANTS, paragraph (b) (1), the daily rate set forth in this contract will be \$1100. This rate supersedes the previous daily rate of \$800.00
- In accordance with FAC 2023-04 published June 2, 2023, this Modification also adds FAR 52.204-27 PROHIBITION ON A BYTEDANCE COVERED APPLICATION (JUNE 2023).

Except as provided herein, all other terms and conditions of contract 91990022C0014 remains unchanged and in full force and effect.

Contractor's Statement of Release

In consideration of the modification agreed to herein as complete Equitable Adjustment for the updated Period of Performance, the contractor hereby releases the Government from all liability under this contract for further adjustments attributable to such facts or circumstances giving rise to this change.

Case 8:25-cv-01154-BAH Document 46-23 Flied 06/24/25 Page 329 of 364 Burnitaservices Suprises Suprises Primary Contracting Officer Representative: Janelle Sands, 202-245-6786, janelle sands@ed.gov Alternate Contracting Officer Representatives; Christopher Boccanfuso, chris boccanfuso@ed.gov Primary Technical Point of Contact: Janelle Sands, 202-246-6786, janelle sands@ed.gov Alternate Technical Point of Contact: Janelle Sands, 202-246-6786, janelle sands@ed.gov Alternate Technical Point(s) of Contact: None (New Line Item) Regional Educational Laboratories (REL) Southeast Cost Plus Fixed Fee Accounting and Appropriation Data: 1100M2023.8 2023 ER0000000.R12.2550A.000.117. 0000 00000 S853.00.00 Period of Performance: 01/24/2022 to 01/02/2027 Pricing Option: Cost Plus-Fixed-Fee	Contracting Officer: Jos Joseph.Gibbs@ed.gov Primary Contracting Off Sands, 202-245-6786, Alternate Contracting Officer: Joseph.Gibbs@ed.gov	useph Gibbs, 202-245-6016, v fficer Representative: Janelle, janelle.sands@ed.gov Officer Representative(s):	23 Filed (Page 329 of UNIT PRICE	364 AMOUNT
Joseph.Gibbs@ed.gov Primary Contracting Officer Representative: Janelle Sands, 202-245-6786, janelle.sands@ed.gov Alternate Contracting Officer Representative(s): Christopher Boccanfuso, chris.boccanfuso@ed.gov Primary Technical Point of Contact: Janelle Sands, 202-245-6786, janelle.sands@ed.gov Alternate Technical Point(s) of Contact: None (New Line Item) Regional Educational Laboratories (REL) Southeast Cost Plus Fixed Fee 1.00 SE 803,000.00 803,000.00 Period of Performance: 01/24/2022 to 01/02/2027	Joseph.Gibbs@ed.gov Primary Contracting Off Sands, 202-245-6786, Alternate Contracting Off	v fficer Representative: Janelle , janelle.sands@ed.gov Officer Representative(s):				
	202-245-6786, janelle. Alternate Technical Poi None (New Line Item) Regional Educational L Cost Plus Fixed Fee Accounting and Approp 1100M2023.B.2023.ER 0000.000000 \$803,000.00 Period of Performance:	e.sands@ed.gov pint(s) of Contact: Laboratories (REL) Southeast priation Data: R000000.RL2.2550A.000.117.	1.00	SE	803,000.00	803,000.00

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H.2	3452.237-70 SERVICES OF CONSULTANTS (MAY 2011)	5
SECTION	N J LIST OF ATTACHMENTS	
.T 1	Deliverable Schedule	6

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SPECIAL CONTRACT REQUIREMENTS

- H.1 52.204-27 PROHIBITION ON A BYTEDANCE COVERED APPLICATION (JUNE 2023)
 - (a) Definitions. As used in this clause--

Covered application means the social networking service TikTok or any successor application or service developed or provided by ByteDance Limited or an entity owned by ByteDance Limited. Information technology, as defined in 40 U.S.C. 11101(6)--

- (1) Means any equipment or interconnected system or subsystem of equipment, used in the automatic acquisition, storage, analysis, evaluation, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information by the executive agency, if the equipment is used by the executive agency directly or is used by a contractor under a contract with the executive agency that requires the use--
 - (i) Of that equipment; or
- (ii) Of that equipment to a significant extent in the performance of a service or the furnishing of a product;
- (2) Includes computers, ancillary equipment (including imaging peripherals, input, output, and storage devices necessary for security and surveillance), peripheral equipment designed to be controlled by the central processing unit of a computer, software, firmware and similar procedures, services (including support services), and related resources; but
- (3) Does not include any equipment acquired by a Federal contractor incidental to a Federal contract.
- (b) Prohibition. Section 102 of Division R of the Consolidated Appropriations Act, 2023 (Pub. L. 117-328), the No TikTok on Government Devices Act, and its implementing guidance under Office of Management and Budget (OMB) Memorandum M-23-13, dated February 27, 2023, "No TikTok on Government Devices" Implementation Guidance, collectively prohibit the presence or use of a covered application on executive agency information technology, including certain equipment used by Federal contractors. The Contractor is prohibited from having or using a covered application on any information technology owned or managed by the Government, or on any information technology used or provided by the Contractor under this contract, including equipment provided by the Contractor's employees; however, this prohibition does not apply if the Contracting Officer provides written notification to the Contractor that an exception has been granted in accordance with OMB Memorandum M-23-13.
- (c) Subcontracts. The Contractor shall insert the substance of this clause, including this paragraph (c), in all subcontracts, including subcontracts for the acquisition of commercial products or commercial services.

(End Of Clause)

H.2 3452.237-70 SERVICES OF CONSULTANTS (MAY 2011)

Except as otherwise expressly provided elsewhere in this contract, and notwithstanding the provisions of the clause of the contract entitled "Subcontracts" (FAR 52.244-2), the prior written approval of the contracting officer shall be required--

- (a) If any employee of the contractor is to be paid as a "consultant" under this contract; and (b)
- (1) For the utilization of the services of any consultant under this contract exceeding the daily rate set forth elsewhere in this contract or, if no amount is set forth, \$800, exclusive of travel costs, or if the services of any consultant under this contract will exceed 10 days in any calendar year.
- (2) If that contracting officer's approval is required, the contractor shall obtain and furnish to the contracting officer information concerning the need for the consultant services and the reasonableness of the fee to be paid, including, but not limited to, whether fees to be paid to any consultant exceed the lowest fee charged by the consultant to others for performing consultant services of a similar nature.

(End of Clause)

							SCHEDULE OF I	DELIVER	ABLES			
	De	eliv	era	bl	e #		Deliverable Name	Draft Date Due	Submitted	Approved	Final Date Due	Comments
TA	SK	1	- RI	EL	M	ana	agement & Reporting					
1	. 1						Summary of REL Kickoff Meeting					
1	. 1		1				Summary of REL Kickoff Meeting	NA	NA	NA	2/21/22	
1	. 2		1				Bimonthly call agendas					
1	. 2		1	·	1		Year 1 February Call 1 Agenda	2/7/22	2/7/2022	2/7/2022	2/9/22	
1	. 2	<u> </u> .	1	·	2		Year 1 February Call 2 Agenda	2/21/22	2/18/2022	2/18/2022	2/23/22	
1	. 2		1	·	3		Year 1 March Call 1 Agenda	3/7/22	3/4/2022	3/7/2022	3/9/22	
1	. 2	ŀ	1	·	4	\perp	Year 1 March Call 2 Agenda	3/21/22	3/21/2022	3/21/2022	3/23/22	
1	. 2	<u> </u> .	1		5		Year 1 April Call 1 Agenda	4/4/22	4/4/2022	4/6/2022	4/6/22	
1	. 2		1	·	6		Year 1 April Call 2 Agenda	4/18/22	4/18/2022	4/18/2022	4/20/22	
1	. 2		1	·	7		Year 1 May Call 1 Agenda	5/2/22	5/2/2022	5/2/2022	5/4/22	
1	. 2		1	·	8		Year 1 May Call 2 Agenda	5/16/22	5/13/2022	5/13/2022	5/18/22	
1	. 2		1	·	9		Year 1 June Call 1 Agenda	6/6/22	6/6/2022	6/7/2022	6/8/22	
1	. 2		1	·	10		Year 1 June Call 2 Agenda	6/20/22	6/17/2022	6/17/2022	6/22/22	
1	. 2		1	·	11		Year 1 July Call 1 Agenda	7/11/22	7/8/2022	7/11/2022	7/13/22	
1	. 2	ŀ	1		12		Year 1 July Call 2 Agenda	7/25/22	7/22/2022	7/22/2022	7/27/22	
1	. 2	<u> </u> .	1		13		Year 1 August Call 1 Agenda	8/8/22	8/8/2022	8/8/2022	8/10/22	
1	. 2		1		14		Year 1 August Call 2 Agenda	8/22/22	8/19/2022	8/22/2022	8/24/22	
1	. 2		1	·	15		Year 1 September Call 1 Agenda	9/2/22	9/2/2022	9/2/2022	9/4/22	
1	. 2		1	·	16		Year 1 September Call 2 Agenda	9/19/22			9/21/22	Call was cancelled.
1	. 2		1	·	17		Year 1 October Call 1 Agenda	10/3/22	10/3/2022	10/3/2022	10/5/22	
1	. 2		1	·	18		Year 1 October Call 2 Agenda	10/17/22	10/16/2022	10/19/2022	10/19/22	
1	. 2		1		19		Year 1 November Call 1 Agenda	10/31/22	10/31/2022		11/2/22	

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1 .	2	2	. 1		20	Year 1 November Call 2 Agenda	11/14/22	11/10/2022	11/14/2022	11/16/22	
1 .	2	2	. 1	۱	21	Year 1 December Call 1 Agenda	12/5/22	12/5/2022	12/5/2022	12/7/22	
1 .	2	2	. 1		22	Year 1 December Call 2 Agenda	12/19/22	12/15/2022	12/30/2022	12/21/22	
1 .	2	2	. 1		23	Year 2 January Call 1 Agenda	1/9/23	1/9/2023	1/9/2023	1/11/23	
1 .	2	2	. 1		24	Year 2 January Call 2 Agenda	1/23/23	1/23/2023	1/23/2023	1/25/23	
1 .	2	2	. 1	١ .	25	Year 2 February Call 1 Agenda	2/6/23	2/6/2023	2/7/2023	2/8/23	
1 .	2	2	. 1	١ .	26	Year 2 February Call 2 Agenda	2/20/23	2/17/2023	2/17/2023	2/22/23	
1 .	2	2	. 1		27	Year 2 March Call 1 Agenda	3/6/23	3/6/2023	3/6/2023	3/8/23	
1 .	2	2	. 1		28	Year 2 March Call 2 Agenda	3/20/23	3/17/2023	3/21/2023	3/22/23	
1 .	2	2	. 1		29	Year 2 April Call 1 Agenda	4/3/23	4/3/2023	4/4/2023	4/5/23	
1 .	2	2	. 1	١ .	30	Year 2 April Call 2 Agenda	4/17/23	4/14/2023	4/17/2023	4/19/23	
1 .	2	2	. 1	١ .	31	Year 2 May Call 1 Agenda	5/1/23	5/1/2023	5/1/2023	5/3/23	
1 .	2	2	. 1		32	Year 2 May Call 2 Agenda	5/15/23	5/12/2023	5/15/2023	5/17/23	
1 .	2	2	. 1	١ .	33	Year 2 June Call 1 Agenda	6/5/23	6/2/2023	6/5/2023	6/7/23	
1 .	2	2	. 1		34	Year 2 June Call 2 Agenda	6/19/23	6/16/2023	6/20/2023	6/21/23	
1 .	2	2	. 1		35	Year 2 July Call 1 Agenda	7/10/23			7/12/23	
1 .	2	2	. 1		36	Year 2 July Call 2 Agenda	7/24/23			7/26/23	
1 .	2	2	. 1		37	Year 2 August Call 1 Agenda	8/7/23			8/9/23	
1 .	2	2	. 1		38	Year 2 August Call 2 Agenda	8/21/23			8/23/23	
1 .	2	2	. 1		39	Year 2 September Call 1 Agenda	9/4/23			9/6/23	
1 .	2	2	. 1		40	Year 2 September Call 2 Agenda	9/18/23			9/20/23	
1 .	2	2	. 1		41	Year 2 October Call 1 Agenda	10/2/23			10/4/23	
1 .	2	2	. 1		42	Year 2 October Call 2 Agenda	10/16/23			10/18/23	
1 .	2	2	. 1		43	Year 2 November Call 1 Agenda	10/30/32			11/1/32	

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Year 2 March Call 2

Year 2 April Call 1

3/29/23

4/12/23

3/27/2023

4/10/2023

4/5/23

4/19/23

4/4/2023

4/17/2023

1	. 2	Τ.	2	Ī	30	Т	Year 2 April Call 2	4/26/23	4/21/2023	4/30/2023	5/3/23	
1	. 2	†	2		31	+	Year 2 May Call 1	5/10/23	5/8/2023	5/16/2023	5/17/23	
1	. 2	†	2	_	32	+	Year 2 May Call 2	5/24/23	5/22/2023	6/1/2023	5/31/23	
1	. 2	Ť	2	_	33	+	Year 2 June Call 1	6/14/23	6/8/2023	6/14/2023	6/21/23	
1	. 2	†	2	_	34	+	Year 2 June Call 2	6/28/23	6/23/2023	0/11/2023	7/5/23	
1	. 2	۲	2	_	35	+	Year 2 July Call 1	7/19/23	0/23/2023		7/26/23	
1	. 2	╀	2	_	36	╫	Year 2 July Call 2	8/2/23			8/9/23	
1	. 2	╀	2		37	╫	Year 2 August Call 1	8/16/23			8/23/23	
1	. 2	╀	2	_	38	╫	Year 2 August Call 2	8/30/23			9/6/23	
1	. 2	╀	2	_	39	╫	Year 2 September Call 1	9/13/23			9/20/23	
1	. 2	╀	2	_	40	╫	Year 2 September Call 2	9/13/23			10/4/23	
\vdash	. 2	ا	2	_	41	+	Year 2 October Call 1					
1	-	ŀ	-	_	41	╀	Year 2 October Call 2	10/11/23			10/18/23	
1	. 2	ŀ	2	-	$\overline{}$	╀	Year 2 November Call 1	10/25/23			11/1/23	
1	. 2	ŀ	2	-	43	╀		11/8/23			11/15/23	
1	. 2	ŀ	2	_	44	+	Year 2 November Call 2	11/22/23			12/6/23	
1	. 2	ŀ	2	_	45	╀	Year 2 December Call 1	12/13/23			12/20/23	
1	. 2	ŀ	2		46	+	Year 2 December Call 2	12/22/23			12/29/23	
1	. 2	ŀ	2	_	47	╀	Year 2 January Call 1	1/17/24			12/30/23	
1	. 2	ŀ	2	_	48	4	Year 2 January Call 2	1/31/24			12/31/23	
1	. 2	ŀ	2	_	49	+	Year 2 February Call 1	2/14/24			1/1/24	
1	. 2	ļ.	2	·	50	_	Year 2 February Call 2	2/28/24			1/2/24	
	١.			١			Department					
1	. 4			1			presentation briefing					
Щ	╙	┡	Ш	4		╀	materials					
						1	Department presentation	3 weeks				
1	. 4	.	1	·	1	1	briefing materials - Year 2	before each				
Н	╄	╀	Щ	4	_	+	first meeting	meeting				
	١.					1	Summary of department	3 weeks				
1	. 4	.	1	·	2	1	presentation - Year 2 first	before each				
Н	╀	╀	Ш	4	_	+	meeting	meeting				
	١.					1	Summary of department	3 weeks				
1	. 4	·	1		3	1	presentation - Year 2	before each				
Н	+	╀	Н	+	_	+	second meeting	meeting				
	,					1	Summary of department	1 week after				
1	. 4	.	1		4	1	presentation - Year 2	each meeting				
H	\vdash	\vdash	\vdash	+		+	second meeting					
1	_						Identify, establish,					
1	. 5						maintain and convene					
\vdash		-	\square	4		+	the Governing Board					
	1 _		,				Report of the	5 weeks after	2/24/2022	2/20/2022	2/20/2022	
1	. 5	.	1	\cdot	1		Establishment of the	award	2/24/2022	2/28/2022	2/28/2022	
H	+	+	$\vdash \vdash$	+	\dashv	+	Governing Board					
							Agenda and materials for					
1	. 5		2		1		Governing Board meeting - Year 1 Spring Governing	2/11/22	2/11/2022	3/4/2022	3/4/2022	
							Board meeting					
Ш	\perp	\perp	Ш	\perp	\Box	\perp	Toolard meeting					

_	_	_	_		_						•	
1		5		3		1	Meeting minutes and action items - Year 1 Spring Governing Board meeting	3/21/22	3/21/2022	3/30/2022	4/4/2022	
1		5		2		2	Agenda and materials for Governing Board meeting - Year 1 Fall Governing Board meeting	3 weeks before meeting	9/16/2022	9/29/2022		
1		5		3		2	Meeting minutes and action items - Year 1 Fall Governing Board meeting	10/24/22	10/21/2022	10/26/2022		
1		5		2		3	Agenda and materials for Governing Board meeting - Year 2 Spring Governing Board meeting	3 weeks before meeting	4/3/2023	4/18/2023		
1		5	•	3		3	Meeting minutes and action items - Year 2 Spring Governing Board meeting	2 weeks after meeting	5/3/2023	5/15/2023		
1		5	•	2		4	Agenda and materials for Governing Board meeting - Year 2 Fall Governing Board meeting	3 weeks before meeting				
1		5		3		4	Meeting minutes and action items - Year 2 Fall Governing Board meeting	2 weeks after meeting				
1	\cdot	6					Bi-Annual Assessment of Progress Report					
1		6		1		1	Memo: Bi-Annual Assessment of Progress	4/15/22	5/2/2022	5/11/2022	5/15/2022	
1		6		1		2	Bi-Annual Assessment of Progress Report	12/1/22	11/30/2022	1/4/2023	12/31/2022	
1		6	•	1		3	Bi-Annual Assessment of Progress Report	6/16/23	6/16/2023		7/16/2023	Original due date was 06/01/2023. Approved by Janelle via email on 05/31/2023.
1		6		1		4	Bi-Annual Assessment of Progress Report	12/1/23			12/31/2023	
1	\cdot	7					Monthly Progress Report					
1	\cdot	7		1		1	Year 1 February Monthly Progress Report	3/15/22	3/11/2022	3/16/2022	3/29/2022	
1		7		1		2	Year 1 March Monthly Progress Report	4/15/22	4/15/2022	4/18/2022	4/29/2022	
1	$\cdot \cdot $	7		1		3	Year 1 April Monthly Progress Report	5/16/22	5/13/2022	5/17/2022	5/30/2022	

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1 .	7		1		4		Year 1 May Monthly Progress Report	6/15/22	6/15/2022	6/21/2022	6/29/2022	
1 .	7		1		5		Year 1 June Monthly Progress Report	7/18/22	7/18/2022	7/18/2022	8/1/2022	
1 .	7		1		6		Year 1 July Monthly Progress Report	8/15/22	8/11/2022	8/22/2022	8/29/2022	
1 .	7	1.	1		7		Year 1 August Monthly Progress Report	9/16/22	9/16/2022	9/26/2022	9/30/2022	
1 .	7		1		8		Year 1 September Monthly Progress Report	10/17/22	10/17/2022	10/20/2022	10/31/2022	
1 .	7		1		9		Year 1 October Monthly Progress Report	11/15/22	11/16/2022	11/19/2022	11/29/2022	
1 .	7		1		10		Year 1 November Monthly Progress Report	12/15/22	12/14/2022	1/31/2023	12/29/2022	
1 .	7	1.	1	ŀ	11		Year 1 December Monthly Progress Report	1/16/23	1/17/2023	2/16/2023	1/30/2023	
1 .	7	1.	1		12		Year 2 January Monthly Progress Report	2/15/23	2/15/2023	2/23/2023	3/1/2023	
1 .	7		1		13		Year 2 February Monthly Progress Report	3/15/23	3/13/2023	3/21/2023	3/29/2023	
1 .	7		1		14		Year 2 March Monthly Progress Report	4/17/23	4/11/2023	4/14/2023	5/1/2023	
1 .	7		1		15		Year 2 April Monthly Progress Report	5/15/23	5/11/2023	5/17/2023	5/29/2023	
1 .	7		1		16		Year 2 May Monthly Progress Report	6/15/23	6/15/2023	6/22/2023	6/29/2023	
1 .	7		1		17		Year 2 June Monthly Progress Report	7/18/23			8/1/2023	
1 .	7		1		18		Year 2 July Monthly Progress Report	8/15/23			8/29/2023	
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1 .	7		1		23		Year 2 December Monthly Progress Report	1/17/24			1/31/2024	
1 .	7		1		24		Year 3 January Monthly Progress Report	2/15/24			2/29/2024	
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Н	+	\dashv	\dashv		Н		H	\vdash	Year 1 Joint needs sensing					
2	1	3		3		1			summary meeting minutes	12/5/22	12/5/2022	12/20/2022	12/19/2022	
	11	۱ ۲	٠.	٦	۱٠	1	П	ı	Janniary meeting minutes	12/3/22	121212022	1 12/20/2022	12/17/2022	ı
-		- 1	- 1				ш							1

2	. 3			3		2			Year 2 Joint needs sensing summary meeting minutes	TBD				
TA	ASF	C 3	3 -	W	01	rki	ng	in	Partnership with Stake					
3	. 1	L							Conduct needs-sensing and develop partnerships					
3	. 1			1		1			Partnership Proposal South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)	4/29/2022	4/15/2022	4/19/2022	5/31/2022	
3	. 1			1		2			Partnership Proposal Mississippi Adolescent Literacy (MSAL)	4/29/2022	4/28/2022	5/11/2022	5/31/2022	
3	. 1			1		3			Partnership Proposal Alabama Research Partnership on Improving English Learner Outcomes (AL ELO)	4/29/2022	4/29/2022	5/11/2022	5/31/2022	
3	. 1			1		4			Partnership Proposal Florida K-3 Literacy (FLK3)	11/30/2022	9/20/2022		12/30/2022	
3	. 1			1		5			Partnership Proposal Florida Virtual School Partnership (FLVS)	6/30/2022	6/23/2022	6/29/2022	7/29/2022	
3	. 1			1		6			Partnership Proposal School Climate and Literacy (SCAL4GA)	6/30/2022	6/30/2022	7/22/2022	7/30/2022	
3	. 1			1		7			Partnership Proposal North Carolina Competency-Based Education Partnership (NCCBE)	4/29/2022	4/29/2022	5/10/2022	5/31/2022	
3	. 1			1		8			Partnership Proposal Diversifying the Educator Pipeline at Historically Black Colleges and Universities (HBCUs)	2/28/2023	2/28/2023	3/9/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.
3	. 1			1		9			New Partnership Proposal	weeks before				
3	. 1		·	1		10			New Partnership Proposal	weeks before				

				Maintain partnerships					
3	2			under subtask 3.1					
3	. 2	1	1	Partnership meeting materials and agendas for Year 1 Quarter 1	4/28/2022	NA		5/12/2022	
3	. 2	2	1	Partnership meeting summary memos for Year 1 Quarter 1	4/28/2022	NA		5/12/2022	
3	. 2	1	2	Partnership meeting materials and agendas for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022	
3	. 2	2	2	Partnership meeting summary memos for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022	
3	. 2	1	3	Partnership meeting materials and agendas for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022	
3	. 2	2	3	Partnership meeting summary memos for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022	
3	. 2	1	4	Partnership meeting materials and agendas for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023	
3	. 2	2	4	Partnership meeting summary memos for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023	
3	. 2	1	5	Partnership meeting materials and agendas for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023	
3	. 2	2	5	Partnership meeting summary memos for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023	
3	. 2	1	6	Partnership meeting materials and agendas for Year 2 Quarter 2	7/27/2023			8/10/2023	
3	. 2	2	6	Partnership meeting summary memos for Year 2 Quarter 2	7/27/2023			8/10/2023	
3	. 2	1	7	Partnership meeting materials and agendas for Year 2 Quarter 3	10/27/2023			11/10/2023	
3	. 2	2	7	Partnership meeting summary memos for Year 2 Quarter 3	10/27/2023			11/10/2023	
3	. 2	1	8	Partnership meeting materials and agendas for Year 2 Quarter 4	1/31/2024			2/14/2024	

	T	2		2		0	Γ		Partnership meeting	1/21/2024			2/14/2024	
3	•	2		2	•	8	L		summary memos for Year 2 Quarter 4	1/31/2024			2/14/2024	
3		2		1		9			Partnership meeting materials and agendas for Year 3 Quarter 1	4/28/2024			5/12/2024	
3		2		2		9			Partnership meeting summary memos for Year 3 Quarter 1	4/28/2024			5/12/2024	
3		2		3		1			Summary of Stakeholder Feedback Survey results for partnerships Year 1	11/30/2022	11/30/2022	12/9/2022	12/14/2022	
3		2		3		2			Summary of Stakeholder Feedback Survey results for partnerships Year 2	11/30/2023			12/14/2023	
TA	18	K	4 -	Tı	a	ini	ng	<u>, (</u>	Coaching, and Technical					
4		1							TCTS Projects					
4		1		1		*		*	South Carolina Emergent Literacy Professional Learning Community Sarah Hughes					
4		1		1	_	2		1	Proposal	4/29/2022	4/15/2022	4/21/2022	5/31/2022	
4		1		1		3		1	Materials and Agenda for TCTS Session 1	6/30/2022	6/28/2022	7/12/2022	7/21/2022	
4	·	1		1		3	ŀ	2	Materials and Agenda for TCTS Session 2	9/30/2022	9/20/2022	9/30/2022	10/21/2022	
4	4	1	Ŀ	1	Ŀ	5	Ŀ	1	Interim Project Summary	12/16/2022	12/5/2022	12/15/2022		
4	·	1		1		3	ŀ	3	Materials and Agenda for TCTS Session 3	12/30/2022	12/12/2022	12/20/2022	1/20/2023	
4	·	1		1		3	ŀ	4	Materials and Agenda for TCTS Session 4	3/31/2023	3/13/2023	3/22/2023	4/21/2023	
4		1		1		4		1	Stakeholder Feedback Survey	10 working days after final event	4/11/2023	4/17/2023	25 working days after final event	
4		1		1		5		2	Coaching Summary and Stakeholder Feedback Survey Summary	6/30/2023	4/17/2023	4/24/2023	7/14/2023	
4	·	1		2	ı	*		*	Adolescent Literacy Strateg					
4	4	1	니	2	Ŀ	2	Ŀ	1	Proposal	4/29/2022	4/28/2022	5/3/2022	5/29/2022	
4	·	1	·	2		3		1	Materials and Agenda for TCTS Session 1	8/30/2022	6/27/2022	6/30/2022	9/20/2022	
4	·	1	·	2		3	Ŀ	2	Materials and Agenda for TCTS Session 2	9/30/2022	7/19/2022	7/20/2022	10/21/2022	
4		1		2		3		3	Materials and Agenda for TCTS Session 3	10/31/2022	8/22/2022	9/7/2022	11/21/2022	

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4 .	1	4		3		5	Materials and Agenda for TCTS Session 5	11/29/2022	11/28/2022	12/9/2022	12/13/2022	
4.	1	4		3		6	Materials and Agenda for TCTS Session 6	1/17/2023	1/13/2023	1/23/2023	1/31/2023	
4.	1	4		3		7	Materials and Agenda for TCTS Session 7	2/14/2023	2/13/2023	2/21/2023	2/28/2023	
4 .	1	4		3		8	Materials and Agenda for TCTS Session 8	3/14/2023	3/14/2023	3/28/2023	3/28/2023	
4 .	1	4		3		9	Materials and Agenda for Coaching Session 9	4/11/2023	4/11/2023	4/17/2023	4/25/2023	
4 .	1	4		3		10	Materials and Agenda for Coaching Session 10	8/30/2023			9/13/2023	
4 .	1	4		3		11	Materials and Agenda for Coaching Session 11	11/16/2023			11/30/2023	
4 .	1	4		3		12	Materials and Agenda for Coaching Session 12	2/15/2024			2/29/2024	
4 .	1	4		3		13	Materials and Agenda for Coaching Session 13	3/29/2024			4/12/2024	
4 .	1	4	\Box	5		1	Interim Project Summary	4/28/2023	5/3/2023	5/5/2023	5/12/2023	
4 .	1	4		4		1	Stakeholder Feedback Survey	6/21/2024			25 working days after final event	
4 .	1	4		5		2	Final Summary	5/31/2024	5/31/2023		6/14/2024	
4 .	1	5		*		*	FLK5 Implementation of K-5 Literacy Academies					
4 .	1	5		1		1	Concept Paper for FLK5 In	9/30/2022	9/20/2022	10/2/2022	10/30/2022	
4 .	1	5		2		1	Proposal	11/30/2022	11/21/2022	12/6/2022	12/30/2022	
4 .	1	5		3		1	Materials and Agenda for T	1/31/2023	1/10/2023	1/23/2023	TBD	
4 .	1	5		4		1	Stakeholder Feedback Surv	10 working days after final event	2/16/2023	2/28/2023	25 working days after final event	
4.	1	5		5		1	Post-event Summary for TO	days after	2/16/2023	2/28/2023		
4 .	1	5	·	3	Ŀ	2	Materials and Agenda for T	3/31/2023	2/14/2023	2/28/2023		
4 .	1	5		4		2	Stakeholder Feedback Surv	_	3/15/2023	3/28/2023		
4 .	1	5		5		2	Post-event Summary for TO	_	3/15/2023	3/28/2023		
4 .	1	5		3		3	Materials and Agenda for T	4/30/2023	3/30/2023	4/10/2023		
4 .	1	5		3		4	Materials and Agenda for T	5/31/2023	4/19/2023	4/30/2023		
4 .	1	5		3		5	Materials and Agenda for T	6/30/2023	5/8/2023	5/16/2023		
4 .	1	5		3		6	Materials and Agenda for T	7/31/2023	5/9/2023	5/17/2023		
4 .	1	5		3		7	Materials and Agenda for T	8/31/2023	5/12/2023	5/17/2023		
4 .	1	5		4		3	Stakeholder Feedback Surv					

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4		1		5		5		3	Post-event Summary for TO					
4	. :	1		5	\Box	3		8	Materials and Agenda for T	9/30/2023				
4	. :	1		5		3		9	Materials and Agenda for T	10/31/2023				
4	. :	1		5		3		10	Materials and Agenda for T	11/30/2023				
4		1		5		4		4	Stakeholder Feedback Surv	days after				
4		1		5		5		4	Post-event Summary for TO	days after				
4		1		6		*		1	FLVS Identification of Needs	final arrant				
4		1		6		1		1	Concept Paper for FLVS Identification of Needs	6/30/2022	6/23/2022	6/29/2022	7/29/2022	
4	. :	1		6	$\overline{\cdot}$	2		1	Proposal	8/5/2022	7/22/2022	7/26/2022	9/2/2022	
4		1		6		3		1	Materials and Agenda for TCTS Sessions 1A and 1B	10/13/2022	10/12/2022	10/19/2022	10/27/2022	
4		1		6		3		2	Materials and Agenda for TCTS Session 2	12/30/2022	10/28/2022	11/9/2022	1/13/2023	
4		1		6		3		3	Materials and Agenda for TCTS Session 3	1/31/2022	1/26/2023	2/7/2023	2/14/2022	
4	. :	1		6	$\overline{\cdot}$	5		1	Interim Project Summary	12/15/2022	12/12/2022	12/20/2022	12/29/2022	
4		1		6	•	4		1	Stakeholder Feedback Survey	10 working days after final event	3/14/2023	3/28/2023	25 working days after final event	
4	. :	1		6	\Box	5		2	Final Project Summary	3/14/2023	3/14/2023	3/28/2023	3/28/2023	
4	. 1	1		7		*		*	SCAL4GA Exploring Relationship between School Climate and School Literacy					
4	. :	1		7		1		1	Concept Paper for SCAL4GA Exploring Relationship between School Climate and School Literacy	6/30/2022	6/30/2022	7/22/2022	7/30/2022	
4		1	·	7	Ŀ	2	Ŀ	1	Proposal	8/31/2022	8/29/2022	8/31/2022	10/15/2022	
4		1		7		3		1	Materials and Agenda for TCTS Session #1	10/31/2022	10/18/2022	10/24/2022	11/21/2022	
4		1		7		3		2	Materials and Agenda for TCTS Session #2	12/30/2022	11/28/2022	12/4/2022	1/20/2023	
4	. 1	1		7		3		3	Materials and Agenda for TCTS Session #3	2/28/2023	2/2/2023	2/21/2023	3/21/2023	Original due date was 01/31/2023. Date change approved via email by Janelle on 12/21/2022.

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4		1		7		3		4	Materials and Agenda for TCTS Session #4	3/31/2023	3/10/2023	4/4/2023	4/21/2023	
4		1		7		3		5	Materials and Agenda for TCTS Session #5	4/28/2023	4/17/2023	4/24/2023	5/19/2023	
4		1		7		4		1	Stakeholder Feedback Survey	7/31/2023			25 working days after final event	
4		1	Γ.	7	П	5	Ι.	1	Final Project Summary	7/31/2023			8/14/2023	
4		1		8		*		*	NCCBE Implementation and Lessons Learned in CBE					
4		1		8		1		1	Concept Paper for NCCBE Implementation and Lessons Learned in CBE	4/29/2022	4/29/2022	5/10/2022	5/29/2022	
4	J	1		8	\Box	2		1	Proposal	6/12/2022	6/1/2022	6/10/2022	7/12/2022	
4		1		8		3		1	Materials and Agenda for NEEAT TCTS Session #1	9/9/2022	9/7/2022	9/12/2022	TBD	
4		1		8	·	3		2	Materials and Agenda for TCTS NEHS Session #1	9/9/2022	9/6/2022	9/12/2022	TBD	
4		1		8		3		3	Materials and Agenda for N	10/20/2022	10/20/2022	10/26/2022		
4		1		8		3		4	Materials and Agenda for N	1/6/2023	1/6/2023	1/17/2023		
4		1		8		3		5	Materials and Agenda for N	2/10/2023	2/10/2023	2/21/2023		Original due date was 02/03/2023. Date change approved via email by Janelle on 02/03/2023.
4		1		8		3		6	Materials and Agenda for N	3/17/2023	3/16/2023	3/28/2023		Original due date was 03/03/2023. Date change approved via email by Janelle on 03/01/2023.

4 .	1	8	3	-	7	Materials and Agenda for N	8/4/2023			Original due date was 04/07/2023. Date change approved via email by Janelle on 03/30/2023. Date change from 05/12/2023 to 05/26/2023 approved by Janelle on 05/15/2023. Additional date change to 08/04/223 approved by Janelle on 05/24/2023.
1.	1	8	3		8	Materials and Agenda for N	9/8/2023			Original due date was 08/04/2023. Date change approved via email by Janelle on 05/24/2023.
1 .	1	8	3			Materials and Agenda for N				Original due date was 09/08/2023. Date change approved via email by Janelle on 05/24/2023.
1 .	1	8	3			Materials and Agenda for T Materials and Agenda for T	2/1/2023	1/11/2023	1/23/2023	Original due date was 01/6/2023. Date change approved via email by Janelle on 1/4/2023.

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4	. 1		8		3		12	Materials and Agenda for T	3/1/2023	2/21/2023	3/2/2023		Original due date was 01/6/2023. Date change approved via email by Janelle on 1/4/2023.
4	. 1		8		3		13	Materials and Agenda for T	9/1/2023				Original due date was 08/04/2023. Date change approved via email by Janelle on 1/4/2023.
4	. 1		8		3		14	Materials and Agenda for T	10/2/2023				Original due date was 08/04/2023. Date change approved via email by Janelle on 1/4/2023.
4	. 1		8		4		1	Stakeholder Feedback Survey NEEAT	10 working days after final event			25 working days after final event	
4	. 1		8		4		2	Stakeholder Feedback Survey NEHS	10 working days after final event			25 working days after final event	
4	. 1		8		5		1	Interim Project Summary	7/31/2023			8/14/2023	
4	. 1		8		5		2	Final Project Summary	7/31/2024			8/14/2024	
4	. 1		9		*	•	*	HBCUs Examination of Teacher Preparation Outcomes					
4	. 1		9		1		1	Concept Paper for HBCU Examination of Teacher Preparation Outcomes	2/28/2023	2/28/2023	3/8/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.
4	. 1		9		2	Ŀ	1	Proposal	5/31/2023	5/30/2023	6/2/2023		
4	. 1		9		3	ŀ	1	Materials and Agenda for TCTS Sessions #1	8/15/2023			8/29/2023	
4	. 1		9		3		2	Materials and Agenda for TCTS Sessions #2	8/15/2023			8/29/2023	

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4	. 1		9		3		3	Materials and Agenda for TCTS Sessions #3	10/16/2023			10/30/2023	
4	. 1		9		3		4	Materials and Agenda for TCTS Sessions #4	11/15/2023			11/29/2023	
4	. 1		9		3		5	Materials and Agenda for TCTS Sessions #5	2/15/2024			2/29/2024	
4	. 1		9		3		6	Materials and Agenda for TCTS Sessions #6	2/15/2024			2/29/2024	
4	. 1		9		3		7	Materials and Agenda for TCTS Sessions #7	5/15/2024			5/29/2024	
4	. 1		9		3		8	Materials and Agenda for TCTS Sessions #8	8/15/2024			8/29/2024	
4	. 1		9		3		9	Materials and Agenda for TCTS Sessions #9	10/15/2024			10/29/2024	
4	. 1		9		3		10	Materials and Agenda for TCTS Sessions #10	1/15/2025			1/29/2025	
4	. 1		9		4		1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	. 1	\vdash	9	+	5	Н	1	Interim Project Summary	5/31/2024				
4	. 1	Ė.	9	1	5	Ė	_	Final Project Summary	5/31/2025				
4	. 1		10		*		*	Indian River School District Evaluation Planning	0.01.2020				
4	. 1		10		1		1	Concept Paper	TBD	11/4/2022		TBD	
4	. 1		10		2		1	Proposal	TBD	12/5/2022	12/15/2022	TBD	
4	. 1		10		3		1	Materials and Agenda for TCTS Sessions	TBD	1/17/2023	1/24/2023	TBD	
4	. 1		10		4		1	Stakeholder Feedback Survey	10 working days after final event	3/22/2023	3/28/2023	25 working days after final event	
4	. 1		11		*		*	FLVS	TBD				
4	. 1		11	·	1		1	Concept Paper for FLVS	TBD	6/13/2023	6/28/2023	TBD	
4	. 1		11	·	2	Ŀ	1	Proposal	TBD			TBD	
4	. 1		11		3		1	Materials and Agenda for TCTS Session #1	TBD			TBD	
4	. 1		11	·	3		2	Materials and Agenda for TCTS Session #2	TBD			TBD	
4	. 1		11	·	3		3	Materials and Agenda for TCTS Session #3	TBD			TBD	
4	. 1		11	·	3		4	Materials and Agenda for TCTS Session #4	TBD			TBD	
4	. 1		11	·	3		5	Materials and Agenda for TCTS Session #5	TBD			TBD	
4	. 1		11		3		6	Materials and Agenda for TCTS Session #6	TBD			TBD	

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4 .	1		11		3		7	Materials and Agenda for TCTS Session #7	TBD	TBD	
4.	1		11		3		8	Materials and Agenda for TCTS Session #8	TBD	TBD	
4 .	1		11		3		9	Materials and Agenda for TCTS Session #9	TBD	TBD	
4 .	1		11		3		10	Materials and Agenda for TCTS Session #10	TBD	TBD	
4 .	1		11		3		11	Materials and Agenda for TCTS Session #11	TBD	TBD	
4 .	1		11		3		12	Materials and Agenda for TCTS Session #12	TBD	TBD	
4 .	1		11		3		13	Materials and Agenda for TCTS Session #13	TBD	TBD	
4 .	1		11		3		14	Materials and Agenda for TCTS Session #14	TBD	TBD	
4 .	1		11		3		15	Materials and Agenda for TCTS Session #15	TBD	TBD	
4 .	1		11		3		16	Materials and Agenda for TCTS Session #16	TBD	TBD	
4 .	1		11		4		1	Stakeholder Feedback Survey	10 working days after final event	25 working days after final event	
4 .	1		11		5	\Box	1	Interim Project Summary	7/31/2024		
4 .	1		11		5		2	Interim Project Summary	7/31/2025		
4 .	1		11		5		_	Final Project Summary	7/31/2026		
4 .	1		12		*		*	TBD - Year 3 or later	TBD		
4 .	1	Ι.	12		1		1	Concept Paper	TBD	TBD	
4 .	1	Ι.	12	.†	2		1	Proposal	TBD	TBD	
4 .	1		12		3		1	Materials and Agenda for TCTS Sessions	TBD	TBD	
4 .	1		12		4		1	Stakeholder Feedback Survey	10 working days after final event	25 working days after final event	
4 .	1		12		5			Interim Project Summary	TBD		
4 .	1	L.	12	.[5		2	Final Project Summary	TBD		
4 .	1		13		*		*	TBD - Year 3 or later	TBD		
4 .	1	L.	13		1		_	Concept Paper	TBD	TBD	
4 .	1		13		2	Ū	1	Proposal	TBD	TBD	
4 .	1		13	·	3		1	Materials and Agenda for TCTS Sessions	TBD	TBD	
4 .	1		13		4		1	Stakeholder Feedback Survey	10 working days after final event	25 working days after final event	
4.	1	<u> </u>	13	·	5	Ŀ	1	Interim Project Summary	TBD		

4	T 1	Т	13	П	5	Т	2	Final Project Summary	TBD			1	
4	. 1	Ė	14	H	*	ŀ	*	TBD - Starting Year 3	TBD				
4	. 1	┢	14	•	1	ŀ	1	Concept Paper	TBD			TBD	
4	. 1	÷	14	H	2	ŀ	1	Proposal	TBD			TBD	
+	1	ا	14	H		ŀ	1	Materials and Agenda for	160			IDD	
4	. 1	ŀ	14	·	3		1	TCTS Sessions	TBD			TBD	
4	. 1		14		4		1	Summary of Stakeholder Feedback Survey results session 1	10 working days after final event			25 working days after final event	
4	. 1	1.	14	\Box	5		1	Interim Project Summary	TBD				
4	. 1	Ţ.	14		5		2	Final Project Summary	TBD				
4	. 2	Π				Γ		Ask an Expert					
4	. 2		1		1			Ask an Expert Proposal- FCS Assistance	TBD	3/16/22	3/18/22	TBD	
4	. 2		2		1			Ask an Expert responses memo for Meeting #1	5/5/22	5/5/22	5/13/2022		
4	. 2		3		1			Ask an Expert responses memo for Meeting #2	5/19/22	5/18/22	5/19/2022		
4	. 2		1		2			Ask an Expert Proposal	TBD	7/13/22	7/13/22		
4	. 2		2		2			Ask an Expert responses memo	5 working days after each	9/15/2022	9/16/2022		
4	. 2		1		3			Ask an Expert Proposal	TBD	12/15/22	1/4/23		Concept paper and proposal submitted and approved. Janelle said proposal was not necessary.
4	. 2		2		3			Ask an Expert responses memo	days after each meeting	3/23/2023	4/4/2023		
4	. 2	Ŀ	1		4			Ask an Expert Proposal	TBD 5 working				
4	. 2		2		4			Ask an Expert responses memo	days after each meeting				
4	. 2	1.	1	П	5	Γ		Ask an Expert Proposal	TBD				
4	. 2		2		5			Ask an Expert responses memo	days after each meeting				
4	. 2	1.	1	П	6	Γ	Г	Ask an Expert Proposal	TBD				
4	. 2		2		6			Ask an Expert responses memo	days after each meeting				
TA	SK	5	- A	pp	lie	d	Re	search and Peer Review	TTATIA TAA				
	. 1							Conduct original, empirical research and develop products					

	Т						Τ	Evaluating the					
5	1	1		1		*	ı	Implementation of the					
		1	ľ	1	ľ		ı	Emergent Literacy PLC					
								Sarah Herrera					
5		1		1	ı	2		Proposal	4/29/2022	4/28/2022	7/13/2022	9/30/2022	
5		1		1		3		Notice of IRB approval or exemption	9/30/2022	9/30/2022	10/12/2022	10/21/2022	
5		1		1	Π	4	Ť	Data Management Plan	4/29/2022	4/28/2022	7/13/2022	9/30/2022	
П	†	\neg	П		Ħ	\neg	†	OMB clearance package					
5		1		1		5		(if applicable to the study)	9/30/2022	9/30/2022		2/28/2023	
5		1	\Box	1	П	6	T	Data sharing agreement	10/14/2022	10/13/2022		11/4/2022	
5		1		1		7	T	Research Report	6/30/2025			2/28/2026	
5		1		2		*	T	AL ELO HQIA+					
5		1		2		1	T	Concept Paper	10/31/2022	10/27/2022		11/14/2022	
5	╫	1	H	2	H	2	+	Proposal	4/30/2023	3/31/2023		5/21/2023	
H	╫	_	H	-	H	-	+	Notice of IRB approval or	1/30/2023	3/31/2023		3/21/2023	
	1				П			exemption					
	1				П			Cacinption					Original due date
	1				П								06/30/2023.
_	1	,		_	П	٦			TDD				
5	1	1	$ \cdot $	2	$ \cdot $	3			TBD				Delayed until
	1				П								TBD as proposal
	1				П								has not been
	1				П								reviewed by RPR.
Ш	4	_	Ц	_	Ц	_	4						05/30/2023
	1				П			Data Management Plan (if					
	1				П			applicable to the study)					
	1				П								Original due date
	1				П								06/30/2023.
5		1		2	.	4			TBD				Delayed until
	1				П								TBD as proposal
	1				П								has not been
	1				П								reviewed by RPR.
	1				П								05/30/2023
H	\dagger		Н		H	\dashv	\dagger	OMB clearance package	1				, , , -
								(if applicable to the study)					
	1				П			(Original due date
	1				П								06/30/2023.
5	1	,		2	П	5			TBD				Delayed until
3	1	1				اد			עפו				I '
	1				П								TBD as proposal
	1				П								has not been
	1				П								reviewed by RPR.
Ш	4	_	Ц		Ц		\perp						05/30/2023
								Data sharing agreement or					
5	\cdot	1	$ \cdot $	2	$ \cdot $	6		memorandum of	8/31/2023			9/14/2023	
Ш	4		Ц		Ц		1	understanding (optional)	ļ				
5		1	Ŀ	2	Ŀ	7	\perp	Research Report	6/30/2025			TBD	

_											
				П		Ш	Toolkit Evaluation:				
				П		Ш	Assisting Students				
				П		Ш	Struggling with Reading:				
5	$ _{1}$		3	П	*	Ш	Response to Intervention				
	` *	Ι.		$\ \cdot\ $		Ш	and Multi-tier Intervention				
				П		Ш	in Primary Grades <i>Katie</i>				
				П		Ш	Dahlke				
Н	+	H		Н		Н					
5	. 1	١.	3	.	2	П	Proposal Toolkit	9/29/2023		3/31/2023	
Н	+	╄	⊢	Н		Н	Evaluation				
5	$ _{1}$	١.	3	l.l	3	П	Notice of IRB approval or	9/30/2024		9/30/2024	
Ш	\perp	Ļ		Ц		Ц	exemption				
5	. 1	<u> .</u>	3	Ŀ	4	Ц	Data Management Plan	9/29/2023		3/31/2023	
5	\int_{1}^{1}		3	П	5	П	OMB clearance package	3/30/2024		9/30/2024	Originally due
	1	١.)	$ \cdot $	3	П		3/30/2024		9/30/2024	03/31/2023.
П	П	Т	П	П		П	Data sharing agreement or				
5	. 1	١.	3	.	6	П	memorandum of	5/31/2024		6/30/2024	
				П		П	understanding				
5	. 1	t.	3	H	7	H	Research Report	12/15/2025		9/30/2026	
5	. 1	i.	4		*	Н	TBD			7.00.	
5	. 1	Ť	4	H	*	П	TBD Year 3 or later	TBD			
5	. 1	÷	4	H	1	Н	Concept Paper	TBD			
5	. 1	Ť	4	H	2	H	Proposal	TBD			
П	+	۲	Н	H		Н	Notice of IRB approval or				
5	. 1	.	4	$ \cdot $	3	П	exemption	TBD			
Н	+	╁	\vdash	Н		Н	Data Management Plan (if				
5	. 1	.	4	$ \cdot $	4	П	applicable to the study)	TBD			
Н	+	+	\vdash	Н		Н	OMB clearance package				
5	\int_{1}^{1}		4	П	5	П	(if applicable to the study)	TBD			
	1	.	-		J	П	(if applicable to the study)	100			
Н	╫	╀	\vdash	Н		Н	Data sharing agreement or	+			
_	1		4	П	,	П	memorandum of	1			
5	. 1	١.	4	$ \cdot $	6	П	1	TBD			
	1	╀	-	Н		Н	understanding (optional)	TDD			
5	. 1	ŀ	4	Ŀ	7	Н	Research Report	TBD			
5	. 1		5	Ŀ		Щ	TBD				
5	. 1	ŀ	5	Ŀ	*	Ц	TBD Year 3 or later	TBD			
5	. 1	ŀ	5	Ŀ	1	Ц	Concept Paper	TBD			
5	. 1	<u> .</u>	5	Ŀ	2	Ц	Proposal	TBD			
5	1		5	П	3	П	Notice of IRB approval or	TBD			
	' '	Ι.	٦	l.	5	Ш	exemption				
5	1		5	П	4	П	Data Management Plan (if	TBD			
3	. 1	.	٦	$ \cdot $	4	П	applicable to the study)	מפו			
		Γ		П		Π	OMB clearance package				
5	. 1	١.	5	.	5	П	(if applicable to the study)	TBD			
				П]				
\sqcap	\top	T	Г	П		\sqcap	Data sharing agreement or				
5	$ _{1}$		5	$\ \ $	6		memorandum of	TBD			
	1		١		-		understanding (optional)				
5	. 1	1.	5	H	7	\forall	Research Report	TBD			
لت		<u>. </u>		٢	,	ш	-r	1 -22			

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5	. 1		6		*	Ц	_	TBD				
5	. 1	<u> </u> .	6	Ŀ	*	Ц	_	TBD Year 3 or later	TBD			
5	. 1		6		1	Ш	C	Concept Paper	TBD			
5	. 1	١.	6		2	П	P	Proposal	TBD			
5	. 1	Τ	6	П	3	П	N	Notice of IRB approval or	TBD			
	1		0		3	Ш	e	exemption	מפו			
5	. 1	Т	6	П	4	П	L	Oata Management Plan (if	TBD			
3	1	.	0	$ \cdot $	4	П	a	applicable to the study)	עפו			
П	Т	Т		П		П	C	OMB clearance package				
5	. 1	.	6	.	5	П	(i	if applicable to the study)	TBD			
						Ш						
П	Т	Т		П		П	Γ	Data sharing agreement or				
5	. 1	.	6	.	6	П	n	nemorandum of	TBD			
				Ш		П	u	inderstanding (optional)				
	1	Т	_	П	7	П	Α	Applied research written	TDD			
5	. 1	.	6	$ \cdot $	/	П		product	TBD			
		Т		П		П	T	Γoolkit Design:				
				П		П		Assisting Students				
				П		П		Struggling with				
				П		П		Reading: Response to				
5	. 2		*	П	*	П		Intervention and Multi-				
3	14	•	-	$ \cdot $		П						
				П		П	- 1	ier Intervention in				
				П		П		Primary Grades				
				П		П	Λ	Marcia Kosanovich				
Щ		\perp		Ц		Ц	4					
5	. 2		1	Ш	2	П		Proposal Toolkit	3/31/2022	3/31/2022	7/29/2022	
Ш		\perp	1	Ŀ		Ц		Development		3/31/2022		
5	. 2	<u> </u> .	1	Ŀ	3	Ц		Γoolkit	7/31/2024		8/29/2025	
				Ш		П		Memo Documenting				
5	. 2	١.	1	.	4	П	c	hanges based on usability	7/31/2024		9/15/2024	
Ш				Ш		Ш		esting				
5	. 2		1	П		П	Ţ	Jpdated toolkit roadmap	7/31/2023			
	. _	Ι.	1		X	Ш	tı	rack	//31/2023			
5	. 2	Т	1	П		П	Ţ	Jpdated toolkit roadmap	9/30/2023			
الا	.		1		X	Ш	tı	rack	9/30/2023			
5	. 2	Т	1	П		П	Ţ	Jpdated toolkit roadmap	11/30/2023			
	. _		1		X	Ш	tı	rack	11/30/2023			
5	1		1	П		П	Ţ	Jpdated toolkit roadmap	1/21/2024			
2	. 2	.	1	$ \cdot $	X	П	tı	rack	1/31/2024			
	Τ,	Т	٦.	П		П	Ţ	Jpdated toolkit roadmap	2/21/2024			
5	. 2	.	1	$ \cdot $	X			rack	3/31/2024			
	1_			П		П		Jpdated toolkit roadmap	5/21/2024			
5	. 2	.	1	$ \cdot $	X			rack	5/31/2024			
	1_	T	٦.	П		П		Jpdated toolkit roadmap	7/21/222			
5	. 2	.	1	$ \cdot $	X			rack	7/31/2025			
	1_	T	,	П		П		Jpdated toolkit roadmap	0/20/2025			
5	. 2	.	1	$ \cdot $	X			rack	9/30/2025			
\vdash	_	_		_	_	_	_					

5	. 2	Ţ.	1		х		Updated toolkit roadmap track	11/30/2025				
5	. 2	<u> </u>	1		х	Ħ	Updated toolkit roadmap track	1/31/2026				
5	. 2		1		х	Ħ	Updated toolkit roadmap track	3/31/2026				
5	. 2		1		х	Ħ	Updated toolkit roadmap track	5/31/2026				
5	. 2		1		х		Updated toolkit roadmap track	7/31/2026				
5	. 2		1		х	П	Updated toolkit roadmap track	9/30/2026				
5	. 2		1		х		Updated toolkit roadmap track	11/30/2026				
5	. 2		1		Х		Updated toolkit roadmap track	1/2/2027				
							Develop Tools to					
_	Ι,		١			П	Support Research					
5	. 4	•	*	•	*	П	Processes and					
						П	Research-Based					
-	1	H	1	Н	ata .	Н	Practices.					
5	. 4		1		*	Н	MS Adolescent Literacy PL					
5	. 4	ŀ	1	ŀ	1	Н	Concept Paper	TBD	4/11/23	4/21/23		
5	. 4	Ŀ	1	Ŀ	2	Ц	Proposal	TBD				
5	. 4		1		3		Notice of IRB approval or exemption	TBD				
5	. 4		1	ŀ	4		Data Management Plan (if applicable to the study)	TBD				
5	. 4		1		5		OMB clearance package (if applicable to the study)	TBD				
5	. 4		1		6		Data sharing agreement or memorandum of understanding (optional)	TBD				
5	. 4		1		7	П	Tool	TBD				
5	. 4		2		*		TBD					
5	. 4		2		1	П	Concept Paper	TBD			TBD	
5	. 4	1.	2	Ţ.	2	П	Proposal	TBD			TBD	
5	. 4		2		3	П	Notice of IRB approval or exemption	TBD				
5	. 4		2		4		Data Management Plan (if applicable to the study)	TBD				
5	. 4		2		5		OMB clearance package (if applicable to the study)	TBD				
5	. 4		2		6		Data sharing agreement or memorandum of understanding (optional)	TBD				

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5	·	4		2		7			Tool	TBD				
	1								Conduct assessment of					
5	\cdot	5							research study quality					
Ш	4				L		L	$oxed{oxed}$	for ESSA compliance					
5		5		1		1	L	L	Concept Paper	As needed				
5		5		2	ŀ	1	L	╙	Proposal	As proposed				
5		5		3		1			Study review(s), peer reviewed by WWC contractor if reviewed using WWC standards	As proposed				
5		5		4		1			Summary memo and/or associated materials stakeholders	As proposed				
T_A	18	SK_	6 -	D	iss	sen	ıiı	nat						
6	\cdot	1							Develop website content					
									N/A					
6		2							Develop Dissemination Materials					
									Infographics/Factsheets					
6		2		1		1			Infographic 1- SCAL4GA Exploring Relationship between School Climate and School Literacy	12/31/2022			5/20/2023	
6		2		1		2			Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic	6/13/2022	6/17/2022	7/6/2022	6/30/2022	
6		2		1		3			Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic Factsheet	6/13/2022	6/17/2022	7/6/2022		
6		2		1		4			Improving Adolescent Literacy Infographic	TBD				
6		2		1		5			Evidence Based Practices for Emergent Literacy Infographic	TBD				
6		2		1		6			Supporting Facilitators Implementing the PLC EL Infographic	TBD				
6		2	Ŀ	1	Ŀ	7	L	L	Infographic/factsheet 7	TBD				
6		2	Ŀ	1	ŀ	8	L	_	Infographic/factsheet 8	TBD				
6		2	Ŀ	1	ŀ	9	L	_	Infographic/factsheet 9	TBD				
6	·	2	Ŀ	1	Ŀ	10			Infographic/factsheet 10	TBD				
									Audio Files					

6 . 2 . 2 . 1 . 1 . 1 Proposal As needed 6 . 2 . 2 . 2 . 1 Script for audio file 1 TBD 6 . 2 . 2 . 3 . 1 Audio file 1 TBD 6 . 2 . 2 . 2 . 1 . 2 Proposal As needed 6 . 2 . 2 . 2 . 2 . 2 Script for audio file 2 TBD 6 . 2 . 2 . 3 . 2 Audio file 2 TBD 6 . 2 . 2 . 1 . 3 Proposal As needed 6 . 2 . 2 . 2 . 3 . 2 Audio file 2 TBD 6 . 2 . 2 . 2 . 3 Script for audio file 3 TBD		
6 . 2 . 2 . 3 . 1 Audio file 1 TBD 6 . 2 . 2 . 1 . 2 Proposal As needed 6 . 2 . 2 . 2 . 2 . 2 Script for audio file 2 TBD 6 . 2 . 2 . 3 . 2 Audio file 2 TBD 6 . 2 . 2 . 3 . 2 Audio file 2 TBD 6 . 2 . 2 . 1 . 3 Proposal As needed		
6 . 2 . 2 . 1 . 2 Proposal As needed 6 . 2 . 2 . 2 Script for audio file 2 TBD 6 . 2 . 2 . 3 . 2 As needed 6 . 2 . 2 . 1 . 3 Proposal As needed		
6 . 2 . 2 . 2 . 2 Script for audio file 2 6 . 2 . 2 . 3 . 2 Audio file 2 TBD 6 . 2 . 2 . 1 . 3 Proposal As needed		
6 . 2 . 2 . 3 . 2 Audio file 2 TBD 6 . 2 . 2 . 1 . 3 Proposal As needed		1 1
6 . 2 . 2 . 1 . 3 Proposal As needed		
6 2 2 2 Serint for audio file 2 TDD		
6 2 2 2 3 Script for audio file 3 TBD		
6 . 2 . 2 . 3 . 3 Audio file 3 TBD		
Videos		
6 . 2 . 3 . 1 . 1 Proposal As needed		
Script and storyboard for		
6 . 2 . 3 . 2 . 1 Script and story board for TBD		
6 . 2 . 3 . 3 . 1 Video 1 TBD		
6 . 2 . 3 . 1 . 2 Proposal As needed		
Script and storyboard for		
6 . 2 . 3 . 2 . 2 script and story board for TBD		
6 . 2 . 3 . 3 . 2 Video 2 TBD		
6 . 2 . 3 . 1 . 3 Proposal As needed		
Script and storyboard for		
6 . 2 . 3 . 2 . 3 script and storyboard for TBD		
6 . 2 . 3 . 3 . 3 Video 3 TBD		
6 . 2 . 3 . 1 . 4 Proposal As needed		
Script and storyboard for		
6 . 2 . 3 . 2 . 4 Script and storyboard for TBD		
6 . 2 . 3 . 3 . 4 Video 4 TBD		
Host events and		
presentations 5/12/2022 5/12/2022	TDD.	
6 . 3 . 1 . 1 SSSR EL SRG TBD 5/13/2022 5/19/2022	TBD	
6 . 3 . 2 . 1 Agenda and materials 6/28/2022 6/30/2022	TBD	
6 . 3 . 3 . 1 Stakeholder feedback 2 weeks after 7/28/2022 7/29/2022	TBD	
survey		
6 . 3 . 1 . 2 PAEC Teacher Guides TBD 5/13/2022 5/19/2022	TBD	
6 . 3 . 2 . 2 Agenda and materials //1/2022 //12/2022	TBD	
Stakeholder feedback 2 weeks after	TBD	
survey	100	
6 . 3 . 1 . 3 CBE Summer Institute TBD 7/26/2022 7/27/2022	TBD	
proposal		
6 . 3 . 2 . 3 Agenda and materials //26/2022 //2//2022	TBD	
6 . 3 . 3 . 3 . Stakeholder feedback 2 weeks after 8/23/2022 8/26/2022	TBD	
survey		
6 . 3 . 1 . 4 MS Literacy Association TBD 8/30/2022 9/6/2022	TBD	
Conference		
6 . 3 . 2 . 4 Agenda and materials 2 weeks before 11/15/2022 11/21/2022	TBD	
6 . 3 . 3 . 4 Stakeholder feedback 2 weeks after 12/16/2022 12/30/2022	TBD	
survey event 12/10/2022 12/30/2022		

	Т				П		$\overline{}$	FL Association of Teacher					1
6		3		1	П	5		Educators Conference	TBD	8/30/2022	9/6/2022	TBD	
10		3		1	$ \cdot $	3		Educators Conference	100	8/30/2022	9/0/2022	IDD	
_	+	3	⊢	2	Н	5	+	Agenda and materials	2 weeks before	11/16/2022	11/19/2022	TBD	
6	4	3	ŀ		H)	+	Stakeholder feedback	ovent .	11/10/2022	11/19/2022	ТБО	
6		3		3	.	5			2 weeks after event			TBD	
Н	+		H		Н	-	+	survey	event				
		2		1	П			Proposal for event or required proposal for	TBD			TDD	
6		3		1	$ \cdot $	6		conference presentation	IBD			TBD	
	+	3	⊢	2	Н	6	+	Agenda and materials	2 weeks before			TBD	
6	4	3	ŀ		H	0	+	Stakeholder feedback	2 weeks after			IDD	
6		3		3	.	6			2 weeks after event			TBD	
Н	+		⊢		Н	\dashv	+	survey AMESOL conference	event				
6		3		1	$ \cdot $	7		proposal	TBD	12/15/2022	12/30/2022	TBD	
6	+	3	\vdash	2	Н	7	+	Agenda and materials	2 weeks before	1/13/2023	1/31/2023	TBD	
	+	3	ŀ		H	+	+	Stakeholder feedback	event	1/13/2023	1/31/2023	IDD	No SFS will be
6		3		3	П	7		survey	2 weeks after			TBD	completed for
0		3)				Survey	event			IDD	this event.
\vdash	+		\vdash		Н	\dashv	+	HEC Literary Tools for					tins event.
6		3		1	$ \cdot $	8		Coaching proposal	TBD	3/2/2023	3/13/2023	TBD	
6	+	3	Н	2	Н	8	+	Agenda and materials	2 weeks before	3/24/2023	4/4/2023	TBD	
П	+		Ė		H	\neg	+	Stakeholder feedback	2 weeks after	3/2 1/2023	17 17 2 0 2 5		
6	·	3	•	3	$ \cdot $	8		survey	event			TBD	
	7	_	Г	_	П		\top	HEC - Teacher Guides		4/11/0000	4/10/2022	TDD	
6		3	·	1	$ \cdot $	9		Family Literacy proposal	TBD	4/11/2023	4/18/2023	TBD	
6		3	Ī.	2	П	9	Τ	Agenda and materials	2 weeks before	5/23/2023	6/1/2023	TBD	
	П	2	Г	3	П	9	Т	Stakeholder feedback	2 weeks after	(/2//2022	(/27/2022	TDD	
6		3	Ŀ	3		9		survey	event	6/26/2023	6/27/2023	TBD	
					П			PAEC Leadership					
6		3		1	$ \cdot $	10		Conference – REL SE	TBD	4/11/2023	4/17/2023	TBD	
Ш			L		Ц			Literacy Tools proposal					
6		3	Ŀ	2	Ŀ	10		Agenda and materials	2 weeks before	6/28/2023		TBD	
6		3		3		10		Stakeholder feedback	2 weeks after			TBD	
Ľ	_	,	Ŀ		Ľ	10	\perp	survey	event			וטט	
					П			Proposal for event or					
6	\cdot	3		1	$ \cdot $	11		required proposal for	As needed			TBD	
\sqcup	\downarrow		L		Ц	Щ	\perp	conference presentation	z weeks before				
6	4	3	Ŀ	2	L	11	\perp	Agenda and materials	event			TBD	
6		3		3		11		Stakeholder feedback	2 weeks after			TBD	
Ľ	4	_	Ė	Ĺ	Ц		\perp	survey	event				
		_			П			Proposal for event or	,			me e	
6	$ \cdot $	3	·	1	$ \cdot $	12		required proposal for	As needed			TBD	
Ļ	4	_	\vdash	_	Н	10	+	conference presentation	2 weeks before			TDD	
6	4	3	ŀ	2	H	12	+	Agenda and materials	event			TBD	
6		3		3	.	12		Stakeholder feedback	2 weeks after			TBD	
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6.	4		1		21	П		Newsletter 21 Dec 2023	11/30/2023			12/14/2023	
6.	5			T		I		Maintain a blog					
6.	5		1		1	\Box		Blog 1	4/29/2022	4/20/2022	4/27/2022	5/13/2022	
6.	5		1		2	\Box		Blog 2	6/30/2022	6/29/2022	7/20/2022	7/14/2022	
6.	5		1		3	\Box		Blog 3	8/31/2022	8/23/2022	9/2/2022	9/14/2022	
6.	5		1		4			Blog 4	10/31/2022	10/17/2022	11/19/2022	11/14/2022	
6 .	5		1		5	\Box		Blog 5	12/16/2022	12/14/2022	1/24/2023	12/30/2022	
						Π		Blog 6					Originally due
				1		1							02/28/2023.
				1		1							Date change to
6.	5		1	\cdot	6	1			3/31/2023	3/27/2023	4/21/2023	4/14/2023	03/31/2023
				1		1							approved by
				1		1							Janelle via email
Ш		Ш				╛							on 02/16/2023.
6.	5		1		7			Blog 7	4/28/2023	4/3/2023	4/28/2023	5/12/2023	
6.	5		1		8	╛		Blog 8	6/30/2023	6/30/2023		7/14/2023	
6.	5		1		9			Blog 9	8/31/2023			9/14/2023	
6.	5		1		10			Blog 10	10/31/2023			11/14/2023	
6.	5		1		11			Blog 11	12/15/2023			12/29/2023	
6.	5		1		12			Blog 12	2/28/2024			3/13/2024	
6.	5		1		13			Blog 13	4/30/2024			5/14/2024	
6.	5		1		14			Blog 14	6/30/2024			7/14/2024	
6.	6			1		1		Maintain a social					
0.	U							media presence					
6.	6		1		1			Tweet 1 Year 1 Quarter 1	4/29/2022	4/18/2022	4/20/2022	5/13/2022	
6.	6		1		2			Tweet 2 Year 1 Quarter 2	7/29/2022	7/25/2022	7/27/2022	8/12/2022	
6.	6		1		3			Tweet 3 Year 1 Quarter 3	10/31/2022	10/4/2022	10/14/2022	11/14/2022	
6.	6		1	·	4			Tweet 4 Year 1 Quarter 4	1/31/2023	1/5/2023	1/17/2023	2/14/2023	
6.	6		1		5			Tweet 5 Year 2 Quarter 1	4/28/2023	4/4/2023	4/17/2023	5/12/2023	
6.	6		1		6			Tweet 6 Year 2 Quarter 2	7/31/2023			8/14/2023	
6.	6		1		7			Tweet 7 Year 2 Quarter 3	10/31/2023			11/14/2023	
6.	6		1	·	8	╛		Tweet 8 Year 2 Quarter 4	1/31/2024			2/14/2024	
6.	7					╛		Branding Materials					
6.	7		1	·	1	·	1	Proposal for video 1	As needed				
6.	7		1		2		1	Script and storyboard for video 1	As needed				
6.	7		1		3		1	Video 1	As needed				
6.	7		2		1		1	Brochure or handout	As needed				

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